February 1, 2018

Erik Jacobson  
Director, Regulatory Relations  
Pacific Gas and Electric Company  
77 Beale Street, Mail Code B10C  
P.O. Box 770000  
San Francisco, CA 94177

SUBJECT: CISR-DRP Form and Electric Rule 24 Modifications per Resolution E-4868

Dear Mr. Jacobson:

Advice Letter 5156-E and supplemental 5156-E-A are effective as of January 30, 2018.

Sincerely,

Edward Randolph  
Director, Energy Division
October 6, 2017

Advice 5156-E
(Pacific Gas and Electric Company ID U 39 E)

Public Utilities Commission of the State of California

Subject: CISR-DRP Form and Electric Rule 24 Modifications per Resolution E-4868

Purpose

Pacific Gas and Electric Company (PG&E) seeks approval from the California Public Utilities Commission (Commission or CPUC) to modify Electric Form 79-1152 ("Customer Information Service Request for Demand Response Provider (CISR-DRP) form")\(^1\) and Electric Rule 24\(^2\) (Rule 24) pursuant to Resolution E-4868 (Resolution). Modifications to this Form were discussed by PG&E, SCE, SDG&E, the CPUC, stakeholders, and interested parties during the direct participation enrollment process working group sessions, which were held in compliance with Ordering Paragraph (OP) 10 of Decision (D.) 16-06-008.

The IOUs must coordinate modifications to their Rule 24 and CISR-DRP forms, but are filing advice letters separately. PG&E submits this filing to obtain timely approval for the proposed changes to this Form and Rule 24, which is necessary to successfully implement the online click-through process, as described in the IOUs’ advice letters filed on January 3, 2017, and approved in Resolution E-4868.\(^3\) The revised Rule 24 and CISR-DRP form is the basis for the terms and conditions in the online click-through process. Given that the core functionality of PG&E’s click-through includes features that

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\(^1\) Form 79-1152 is available on PG&E’s website at the following hyperlink: https://www.pge.com/tariffs/tm2/pdf/ELEC_FORMS_79-1152.pdf.

\(^2\) Henceforth, any reference made to Rule 24 that refers to the three investor-owned utilities (IOUs) applies to Electric Rule 24 for PG&E and Southern California Edison Company (SCE) and Electric Rule 32 for San Diego Gas & Electric Company (SDG&E).

\(^3\) "Click-through" is the process by which a customer authenticates itself with the utility and authorizes the release of its data to a third party, which must start and end on the DRP's website. The process also authorizes certain actions to take place that parties agreed would improve the Rule 24 process (e.g., removing C&U customers from the Peak Day Pricing (PDP) program, and reprogramming a residential customer's meter to 15-minute intervals).
are reflected in the modified Rule 24 and CISR-DRP form, including among other things, allowing third-party DRPs to revoke authorizations at any time, PG&E's implementation of Solution 3 is dependent on the Commission's approval of the modified Rule 24 and CISR-DRP. PG&E will not be able to release Phase 1 of the Solution 3 implementation until such time as the CPUC approves the modifications to Rule 24 and the CISR-DRP, such that the terms and conditions align between the CISR-DRP form and the online click-through processes and PG&E has had time to implement system and process changes necessary to support the modified CISR-DRP.

For this reason, PG&E requests that this Tier 2 advice letter become effective by November 16, 2017. PG&E intends to implement the changes requested herein no later than 30 calendar days after receiving CPUC approval. The November 16, 2017 requested date allows PG&E time to implement Phase 1 of its click-through Solution 3 by February 2018, as ordered in OP 26 of Resolution E-4868.

**Background**

Decision 12-11-025 ordered the implementation of Rule 24 for PG&E and SCE and Electric Rule 32 (Rule 32) for SDG&E, which allows third-party DRPs access to retail customers' data for purposes of registering and using retail customers' loads in the CAISO market for demand response, after obtaining the customer's authorization. This decision ordered the IOUs to work with stakeholders to finalize the Commission staff’s proposed Rule 24 and to create related documents to support this rule. The related documents included a specific Customer Information Service Request (CISR) form for DRPs appearing as Electric Form 79-1152, the Service Agreement between the DRP and the utility, the Registration Form for DRPs to register with the Commission, and a standard residential and small commercial customer notification letter that is used for the purposes of Rule 24.

On October 10, 2013, PG&E revised Rule 24 tariff and related documents in Advice 4298-E, which the Commission approved on March 19, 2014 in Resolution E-4630. This Resolution also ordered the IOUs to make modifications to the Form consistent with D.13-12-029, addressing four Petitions for Modification (PFM) on D.12-11-025, which were presented to the Commission in Advice 4361-E and 4361-E-A.

As described in D.16-06-008, PG&E’s process for electronic submission of a CISR-DRP form includes the use of certain third party electronic signature verification vendors, which third-party DRPs criticized as cumbersome for customers. As a result, the Commission found that “direct participation is an evolving process that can be

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4 PG&E submitted Advice 4298-E on behalf of the three IOUs.
improved.” The Commission ruled that the utilities should develop a “click-through” electronic signature process that starts and ends on a third-party DRP’s website and provides customer authentication and authorization for the utility to release the customer’s data to a third-party DRP. It also ordered the utilities to meet with stakeholders to discuss how to simplify the direct participation enrollment process, and to file a consensus proposal in a Tier 3 advice letter, by November 1, 2016.

The utilities and Energy Division hosted the first publicly noticed working group meeting with stakeholders and interested parties on Streamlining and Simplification of Direct Participation Enrollment Process on July 25, 2016. Subsequent publicly noticed meetings were held on August 24, September 13, September 29, October 5, October 18, and November 3, as well as two other meetings on November 16 and December 1. These in-person meetings were supplemented by calls on August 4, September 6, September 28, September 30, October 26, November 10, and November 22. The working group included the utilities, the Energy Division, the Office of Ratepayer Advocates (ORA), Advanced MicroGrid, the California Energy Efficiency Industry Council, Chai Energy, CPower, eMotorWerks, EnergyHub, EnerNOC, Mission:Data, NRG, OhmConnect, Olivine, SolarCity, Stem, Sunrun, UtilityAPI, and WeatherBug, as well as individuals interested in the working group discussions but who may not be parties. The Assigned Commissioner’s office also attended several of the meetings noticed in the Commission Daily Calendar.

The click-through advice letters were submitted on January 3, 2017, in accordance with an extension requested by the IOUs and granted by the Commission’s Executive Director on November 1, 2016.

Also on January 3, 2017, PG&E filed a Petition for Modification of Decision 16-06-008 to align the definition of click-through to the process that stakeholders developed in this same working group process. In particular, PG&E sought to modify the requirement in OP 1 that the click-through process provide the customer and the utility immediate access to a copy of the completed CISR-DRP “form and a time-stamped electronically signed agreement form.” The working group designed the click-through process to provide an electronic authorization that utilizes the same terms and conditions, but did

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6 D.16-06-008, Finding of Fact (FoF) 27.
7 D.16-06-008, pages 11-14; FoF 5, 6, and 7; Conclusions of Law (CoL) 2 and 3; OP 1.
8 D.16-06-008, CoL 13; OP 9 and 10.
9 PG&E Advice 4992-E, SCE Advice 3541-E, and SDG&E Advice 3030-E.
10 PG&E’s Petition for Modification of D.16-06-008, filed January 3, 2017, also requested the ability to enabling mass market implementation of Rule 24 and flexibility in funding.
not involve a CISR-DRP form. The Commission issued D.17-06-005, revising OP 1 of D.16-06-008, to adopt, with modifications, PG&E’s definition for click-through.¹¹

Then, on August 24, 2017, the CPUC issued Resolution E-4868, approving the IOUs’ January 2017 advice letters with OP 12 and OP 28 ordering the IOUs to submit improvements to the Form.¹² Pursuant to Resolution E-4868, PG&E hereby submits this advice letter under Commission’s guidance, and in accordance with the improvements discussed during the working group process as described in the January 3, 2017 advice letters, which specifically address shortening and other modifications to the CISR-DRP Form (both the form and the click-through customer authentication and approval), which are presented in the attachments to this advice letter.

**Proposed Modifications to the CISR-DRP Form**

There were two major goals for the revisions to the CISR-DRP form:

- **Shorten the form to simplify the language and format used, making it easier for customers to fill out, and for the DRPs to assist customers to populate information in the CISR-DRP.**
- **Mirror certain changes required pursuant to the click-through process such that the CISR-DRP process provides a consistent customer experience and utility processing, regardless of whether the customer uses an online click-through process or uses the CISR-DRP Form.** For clarity, the CISR-DRP Form being filed as part of this AL is intended for use (a) in the short term, prior to PG&E’s launch of Phase 1 of click-through Solution 3, and (b) for those parties who may be unable or choose not to use the click-through process for authorization or revocation purposes. A link to a summary and the complete terms and conditions

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¹¹ D.17-06-005, OP 1 states, “Ordering Paragraph 1 of Decision 16-06-008 is modified to read as follows:

> Pacific Gas and Electric Company, San Diego Gas & Electric Company, and Southern California Edison Company are authorized to allow the use of a third-party demand response provider electronic click-through process in which the utility verifies or authenticates the demand response direct participation customer and provides the customer the means to document the customer’s consent to release its usage data to the third-party demand response provider. The click-through process shall provide immediate access, to both the customer and the third-party, to a copy of the Customer Information Service Request Form or to the terms and conditions in a different format. When customer authorization is received through the utility’s electronic click-through process, the utility shall keep an electronic record of the date and time of the authorization, the third party(s) authorized, the Service Agreements authorized, how much historical data was authorized, what data elements were authorized, the end date of the authorization, and changes authorized. The click through process shall begin and end on the third-party demand response provider’s website.”

¹² See, Res. E-4868, OP 7, 8, and 10.
sourced from the CISR-DRP form will be presented on the main authorization page.\textsuperscript{13}

In addition, the working group process reached consensus on the following revisions:

- The field allowing a customer or DRP to specify a start date of the authorization has been eliminated.
- DRPs now have an automatic right to revoke an active authorization.\textsuperscript{14} This modification is particularly important because PG&E’s click-through Solution 3 incorporates this feature as a core requirement.
- Section B includes a summarized list of data items, with the addition of a reference to Rule 24 for a full list.\textsuperscript{15}
- Language is added on Page 1 clarifying that use of this form is for Bundled, Community Choice Aggregation (CCA), and Direct Access (DA) customers per Rule 24.\textsuperscript{16}
- General simplification of duplicate or unnecessary fields and language to streamline the contents of the form and improve understanding, while maintaining the legal rights of all three parties: customers, DRPs, and the IOUs.
- Grouping the DRP sections and moving these sections to the end of the form, with clearer labeling.

These proposed changes will reduce PG&E’s CISR-DRP Form from 4 to 3 pages. To implement these changes, PG&E will accept both forms for a two month period of time, starting from the date when PG&E is able to accept the modified CISR-DRP Form for processing, as a transition period. This two month transition period should allow sufficient time for DRPs to submit CISR-DRPs already signed by customers under the old form, while limiting the amount of time in which both forms must be supported by PG&E.

\textsuperscript{13} As required OP 5 of Resolution E-4868, PG&E will incorporate feedback about the display of terms and conditions for the online click-through Solution 3 from the parties and any other interested stakeholders in the Customer Data Access Committee (CDAC).
\textsuperscript{14} PG&E AL 4992-E, page 12-13, and approved in Resolution E-4868, OP 12.
\textsuperscript{15} Approved in Resolution E-4868, OP 5, for click-through, and similar treatment was supported by the working group in the CISR-DRP form as well.
\textsuperscript{16} Approved in Resolution E-4868, OP 25, for click-through, and similar treatment was supported by the working group in the CISR-DRP form as well.
Modifications Proposed for Rule 24

The following modifications to Rule 24 are proposed to align it to the revisions proposed in the CISR-DRP form\textsuperscript{17}:

- Section D.1.d has been modified to reflect the modified options for the length of authorization (including indefinite\textsuperscript{18}) and the application of the click-through process.
- Sections C.1.d, D.1.d, and G.3.d have been modified for the revisions associated to revocation.\textsuperscript{19}
- Section D.1.a.(2). PG&E will provide up to 48 months of historical interval data.\textsuperscript{20}

In addition, PG&E proposes the following new definition for CISR-DRP that encompasses both the CISR-DRP Form and the online click-through process, which is applied throughout Rule 24:

CISR-DRP: The customer information service request form (Form 79-1152 or its successor) approved by the Commission for customers to authorize the release of their customer information under Section D. 1. a. of this rule to a non-Utility DRP or aggregator for purpose of direct participation in the CAISO wholesale market, or the authorized electronic authorization processes on PG&E’s website or from a non-Utility DRP website for customer authorization to release its customer information to the non-Utility DRP, for the purpose of direct participation.

PG&E also proposes several other changes in this revision that include the following:

- Removal of programs that have been closed as of January 1, 2017, pursuant to D.16-06-029, in Section D.1.b.(2), which may differ between IOUs.
- Addition of new provisions in Section D.1.8 noting that PG&E will provide information to DRPs known at the time of receipt of a CISR-DRP indicating if a customer service agreement is participating in a PG&E-administered pilot program or certain CAISO-administered program which could potentially cause a conflict with the dual participation rules in Section C.2.d. Examples of such programs are PG&E’s Plug-In Electric Vehicle Pilot.
- Minor edits for grammar, consistency, and clarity.

\textsuperscript{17} Pursuant to Ordering Paragraph 13 of Resolution E-4868, PG&E will be filing a Tier 3 Advice Letter requesting additional funding to implement the expanded data set. This AL will include a request to modify Rule 24 so it includes the data elements covered by the expanded data set. However, as required in Table 1, page 75, of Resolution E-4868, this AL will not include the Customer Class Indicator because it is to be delivered in phase 3.

\textsuperscript{18} Approved in OP 7 and OP 8 of Resolution E-4868.

\textsuperscript{19} Approved in OP 10 of Resolution E-4868.

\textsuperscript{20} As described in PG&E AL 4992-E, Appendix D, Sheet 15, and approved in Resolution E-4868, OP 13.
Applicability of Modifications Described Herein to Existing and Future Authorizations

PG&E respectfully requests that the CPUC explicitly state that the requested modifications described herein should also be applied to existing authorizations. Section E of the Form titled “Jurisdiction of CPUC” states, “This agreement at all times shall be subject to such modifications and access to information as the California Public Utilities Commission may direct from time to time in the exercise of its jurisdiction.”

PG&E requires this transition in order to keep all authorizations under the same terms and conditions, including the same revocation terms, for instance, which would otherwise require: 1) the DRPs to obtain an updated authorization from each of their existing customers in order to transition to the updated terms and conditions, 2) eliminates the need for IOUs to build separate processes that vary based on the version of a customer’s authorization that is in effect. PG&E plans to notify customers that submitted CISR-DRPs under the old form that modifications have been made to their existing authorization. The notification will include a complete copy of the new terms and conditions, as contained in the modified CISR-DRP Form.

In addition, the revised CISR-DRP became the basis for the terms and conditions in the online click-through process, and PG&E presents these terms and conditions, which the customers will be able to access when a customer clicks the hyperlink provided to view the full terms and conditions, for Commission approval (see Attachment to this advice letter).

Budget

In this advice letter, PG&E does not make a request to recover the costs associated of implementing the modified CISR-DRP. Recovery of such cost will be requested in a separate submission to be filed via an advice letter and implemented subsequent to the CPUC’s approval of the modifications to the CISR-DRP and Rule 24, as requested in this advice letter. This sequential approach is necessary so that PG&E can implement on a timely basis its click-through Solution 3, utilizing a common set of terms and conditions that will apply to both the old CISR-DRP authorizations as well as new authorizations via the click-through process and modified CISR-DRP Form.

Conclusion

PG&E respectfully requests speedy approval of this Tier 2 advice letter by no later than November 16, 2017 in order to allow better alignment with PG&E’s implementation of the click-through process and to minimize any inconsistencies that emerge with the new CISR-DRP Form and Rule 24.

21 Section E is re-ordered to Section G in the modified CISR-DRP Form (see attachment to this advice letter).
Tariff Revisions

PG&E proposes revisions to Form 79-1152, “Customer Information Service Request for Demand Response Provider (CISR-DRP)”, and Electric Rule No. 24, “Direct Participation Demand Response”. If the CPUC orders any changes to these documents in response to this advice letter, the IOUs request that any modifications be considered for the advice letters filed by SCE and SDG&E, and allow implementation of these changes to be submitted to Energy Division in Tier 1 advice letters.

PG&E also made several updates to the tariff to reflect current practices, which include the following:

- Removal of all language related to Electronic Data Interchange (EDI), which was included in the original approved version of the rule as possible alternative method to deliver data to the DRPs should the original IT implementation be delayed.
- Changes to reflect current CAISO practices
- Changes to dual participation rules between a non-utility DRP and PG&E’s retail DR programs to reflect PG&E’s current retail DR programs and additional practices.

Protests

Anyone wishing to protest this filing may do so by letter sent via U.S. mail, facsimile or E-mail, no later than October 26, 2017, which is 20 days after the date of this filing. Protests must be submitted to:

CPUC Energy Division
ED Tariff Unit
505 Van Ness Avenue, 4th Floor
San Francisco, California  94102

Facsimile: (415) 703-2200
E-mail: EDTariffUnit@cpuc.ca.gov

Copies of protests also should be mailed to the attention of the Director, Energy Division, Room 4004, at the address shown above.

The protest shall also be sent to PG&E either via E-mail or U.S. mail (and by facsimile, if possible) at the address shown below on the same date it is mailed or delivered to the Commission:
Erik Jacobson  
Director, Regulatory Relations  
c/o Megan Lawson  
Pacific Gas and Electric Company  
77 Beale Street, Mail Code B13U  
P.O. Box 770000  
San Francisco, California  94177  

Facsimile: (415) 973-3582  
E-mail: PGETariffs@pge.com

Any person (including individuals, groups, or organizations) may protest or respond to an advice letter (General Order 96-B, Section 7.4). The protest shall contain the following information: specification of the advice letter protested; grounds for the protest; supporting factual information or legal argument; name, telephone number, postal address, and (where appropriate) e-mail address of the protestant; and statement that the protest was sent to the utility no later than the day on which the protest was submitted to the reviewing Industry Division (General Order 96-B, Section 3.11).

Effective Date

Pursuant to General Order (GO) 96-B, D.16-06-008, and Resolution E-4868, PG&E requests that this Tier 2 advice letter become effective by November 16, 2017. PG&E plans to implement these changes no later than 30 calendar days after the date of the CPUC’s disposition letter.

Notice

In accordance with General Order 96-B, Section IV, a copy of this advice letter is being sent electronically and via U.S. mail to parties shown on the attached list [and the parties on the service list for A.14-06-001 et al and R.13-09-011. Address changes to the General Order 96-B service list should be directed to PG&E at email address PGETariffs@pge.com. For changes to any other service list, please contact the Commission’s Process Office at (415) 703-2021 or at Process_Office@cpuc.ca.gov. Send all electronic approvals to PGETariffs@pge.com. Advice letter filings can also be accessed electronically at: http://www.pge.com/tariffs/.

/S/     
Erik Jacobson  
Director, Regulatory Relations  

cc:    Service List A.14-06-001 et al and R.13-09-011
Attachments

This Advice Letter contains the following attachments:

- Attachment 1 – Tariffs with modification (Clean Version)
- Attachment 2 – Redline Tariffs
- Attachment 3 – Full terms and conditions for click-through
Company name/CPUC Utility No. **Pacific Gas and Electric Company** (ID U39 E)

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<td>Yvonne Yang</td>
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**Company Name**: Pacific Gas and Electric Company  
**Utility No.**: ID U39 E

**Utility type**
- ☑ ELC: Electric
- ☐ GAS: Gas
- ☐ PLC: Pipeline
- ☐ HEAT: Heat
- ☐ WATER: Water

**Contact Person**: Yvonne Yang
**Phone #**: (415) 973-2094

**E-mail**: Yvonne.Yang@pge.com and PGETariffs@pge.com

**Explanation of Utility Type**
- ELC = Electric
- GAS = Gas
- PLC = Pipeline
- HEAT = Heat
- WATER = Water

**Advice Letter (AL) #**: 5156-E  
**Tier**: 2

**Subject of AL**: **CISR-DRP Form and Electric Rule 24 Modifications per Resolution E-4868**

**Keywords (choose from CPUC listing)**: Forms, Compliance

**AL filing type**: ☑ Monthly ☐ Quarterly ☐ Annual ☑ One-Time ☐ Other

**If AL filed in compliance with a Commission order, indicate relevant Decision/Resolution #**: ____________

**Does AL replace a withdrawn or rejected AL? If so, identify the prior AL**: No

**Summarize differences between the AL and the prior withdrawn or rejected AL**: ____________

**Is AL requesting confidential treatment? If so, what information is the utility seeking confidential treatment for?**: No

**Name(s) and contact information of the person(s) who will provide the nondisclosure agreement and access to the confidential information**: ____________

**Resolution Required?**: ☐ Yes ☑ No

**Requested effective date**: November 16, 2017  
**No. of tariff sheets**: 29

**Estimated system annual revenue effect (%):** N/A
**Estimated system average rate effect (%):** N/A

**When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting)**.

**Tariff schedules affected**: See attachment 1

**Service affected and changes proposed**: N/A

**Pending advice letters that revise the same tariff sheets**: N/A

**Protests, dispositions, and all other correspondence regarding this AL are due no later than 20 days after the date of this filing, unless otherwise authorized by the Commission, and shall be sent to**:

**California Public Utilities Commission**
**Energy Division**
**EDTariffUnit**
505 Van Ness Ave., 4th Flr.
San Francisco, CA 94102
**E-mail**: EDTariffUnit@cpuc.ca.gov

**Pacific Gas and Electric Company**
**Attn: Erik Jacobson**
**Director, Regulatory Relations**
c/o Megan Lawson
77 Beale Street, Mail Code B13U
P.O. Box 770000
San Francisco, CA 94177
**E-mail**: PGETariffs@pge.com
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<td>Sheet 25</td>
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</table>
ELECTRIC SAMPLE FORM 79-1152
CUSTOMER INFORMATION SERVICE REQUEST FOR DRP (CISR-DRP)

Please Refer to Attached Sample Form
Pacific Gas and Electric Company's (PG&E's) Electric Rule 27 and its corresponding privacy policies, which can be found at www.pge.com/about/company/privacy/customer, generally do not allow for the disclosure of customers' personal information, such as your name, address, phone number, or electric or gas account and billing information, to third parties unless you expressly authorize us to do so. This form allows you to exercise your right to disclose your personal electricity-related information to up to two third-party Demand Response Providers (DRPs), pursuant to PG&E’s Electric Rule 24 (Rule 24), so that you may obtain Demand Response services offered by DRP(s). Rule 24 can be accessed at www.pge.com/tariffs/tm2/pdf/ELEC_RULES_24.pdf. This form may be used for authorization to release Bundled, Community Choice Aggregation (CCA), and Direct Access (DA) customer's information. In some cases, two different DRPs may work in concert to help a customer obtain Rule 24 Demand Response services. Accordingly, this form allows for disclosure of your information to both a First DRP and an optional Second DRP. Alternatively, each DRP may submit its own CISR-DRP forms with your consent to receive personal information about you. Once you authorize access by the DRP(s) to your personal information, you are responsible for ensuring that the DRP(s) safeguards this information from further disclosure without your consent. Authorization for PG&E to release your information under Rule 24 is separate from commitments you may have or may make with the DRP(s) for their services.

This form grants the First DRP the ability to request that PG&E make limited changes to the PG&E electric meter(s) serving your Service Agreement(s), as specified in Section C below.

I, (Customer),

<table>
<thead>
<tr>
<th>Customer Name According To PG&amp;E Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Name (if different from above)</td>
</tr>
<tr>
<td>First</td>
</tr>
<tr>
<td>Last</td>
</tr>
<tr>
<td>E-Mail</td>
</tr>
<tr>
<td>Phone</td>
</tr>
</tbody>
</table>

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

Do hereby □ AUTHORIZE □ REVOKE (check only one) the following DRP(s):

<table>
<thead>
<tr>
<th>Name of First DRP</th>
<th>PG&amp;E Rule 24 ID</th>
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</thead>
<tbody>
<tr>
<td>First</td>
<td></td>
</tr>
<tr>
<td>E-Mail</td>
<td>Phone</td>
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</tbody>
</table>

(Complete the following table only if the customer is authorizing data to be released to one additional DRP)

<table>
<thead>
<tr>
<th>Name of Second DRP</th>
<th>PG&amp;E Rule 24 ID</th>
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</thead>
<tbody>
<tr>
<td>Second</td>
<td></td>
</tr>
<tr>
<td>E-Mail</td>
<td>Phone</td>
</tr>
</tbody>
</table>

Access to the following electric Service Agreements:

<table>
<thead>
<tr>
<th>STREET ADDRESS</th>
<th>SERVICE CITY</th>
<th>SERVICE AGREEMENT ID</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

(You can include an additional 15 service agreements by attaching a list to this form.)
CUSTOMER INFORMATION SERVICE REQUEST FOR DRP (CISR-DRP)

FOR AUTHORIZATION USE ONLY

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.

B. SUMMARY OF INFORMATION AUTHORIZED TO BE RELEASED

I, (Customer), authorize PG&E to disclose to the above DRP(s) for the Service Agreement(s) listed above or attached to this form: 1) customer agreement and account information (e.g., name, service address, rate schedule), 2) access up to 48 months historical and ongoing interval meter data and/or monthly usage data, 3) current PG&E demand response programs in which you are known to participate, and 4) other information identified in Section D of Rule 24.

C. CHANGES YOU AUTHORIZE THE DRP TO MAKE ON YOUR BEHALF

I, (Customer), grant the First DRP permission to request that PG&E shorten the interval length of my electric meter(s), as available by PG&E, for the Service Agreement(s) listed above or attached to this form, when the DRP has successfully enrolled my Service Agreement with the CAISO, if PG&E is the Meter Service Provider.

I, (Customer), grant the above DRP(s) permission to revoke this authorization on my behalf and a revocation submitted by any one party shall revoke this Authorization for all of the other parties to this authorization.

D. CUSTOMER AGREEMENT

I, (Customer), authorize the actions and changes to be made (or undertaken) by PG&E as specified in this authorization. I further understand that my information may be transmitted to the DRP(s) even after the Authorization has ended, limited to updates to the data for the time period during which this Authorization was valid.

I, (Customer), understand and agree that if I am on Peak Day Pricing (PDP), then I will automatically be unenrolled from PDP when my Service Agreement has been successfully setup by the CAISO’s Demand Response systems. I agree to bear any resulting financial consequences, including without limitation, loss of bill protection, incentive payments, and reimbursements to PG&E of incentives, related to my participation in PDP, other PG&E DR programs, or DR enabling technology.

I, (If not Customer of Record), declare that I am authorized to execute this Authorization manually or electronically on behalf of the Customer of Record listed at the top of this form and that I have authority to financially bind the Customer of Record.

I understand PG&E reserves the right to verify any authorization request submitted before releasing information or taking any action on my behalf. I hereby release, hold harmless, and indemnify PG&E from any liability, claims, demands, and causes of action, damages, or expenses resulting from: (1) any release of information to the DRP pursuant to this Authorization; (2) the unauthorized use of this information by the DRP or any third party; and (3) any actions taken by the DRP pursuant to this Authorization. I understand that I may revoke this Authorization at any time by submitting a newly completed copy of this form with the revoke check box selected. I hereby indicate my consent to execute and submit this authorization electronically.

Authorized Signature of Customer or Agent

Date Signed (mm/dd/yyyy)
E. FIRST DRP’S AGREEMENT REGARDING CUSTOMER RELEASE AUTHORIZATION
I, (First DRP), hereby agree to comply with this agreement, and to release, hold harmless, and indemnify PG&E from any liability, claims, demand, causes of action, damages, or expenses resulting from the use of customer information obtained pursuant to this Authorization. I hereby indicate my consent to execute and submit this authorization electronically.

Authorized Signature of First DRP
Date Signed (mm/dd/yyyy)

F. SECOND DRP’S AGREEMENT REGARDING CUSTOMER RELEASE AUTHORIZATION
I, (Second DRP), hereby agree to comply with this agreement, and to release, hold harmless, and indemnify PG&E from any liability, claims, demand, causes of action, damages, or expenses resulting from the use of customer information obtained pursuant to this Authorization. I hereby indicate my consent to execute and submit this authorization electronically.

Authorized Signature of Second DRP
Date Signed (mm/dd/yyyy)

G. JURISDICTION OF CPUC
This agreement at all times shall be subject to such modifications and access to information as the California Public Utilities Commission may direct from time to time in the exercise of its jurisdiction, including, without limitation, revisions to the types of customer information to be released under Rule 24.

FOR REVOCATION USE ONLY

H. CUSTOMER REVOCATION OF AUTHORIZATION
I, (Customer), declare that I am authorized to execute this Revocation manually or electronically on behalf of the Customer of Record listed at the top of this form and that I have authority to financially bind the Customer of Record. I hereby revoke the authorization to release information to the DRP listed above. I hereby release, hold harmless, and indemnify PG&E from any liability, claims, demands, causes of action, damages, or expenses resulting from: (1) any negligent conduct relating to this revocation; (2) any refusal to release information to the DRP pursuant to this revocation; and (3) any conduct by the DRP in connection with this revocation. I hereby indicate my consent to execute and submit this revocation electronically.

Authorized Signature of Customer or Agent
Date Signed (mm/dd/yyyy)

I. DRP REVOCATION OF AUTHORIZATION/DISENROLLMENT FROM DRP(S) DEMAND RESPONSE SERVICE
I, (DRP), hereby revoke the authorization to release the Customer’s information to the above designated DRP. Further, I hereby notify PG&E that the date of the Customer’s actual or anticipated disenrollment from my Demand Response services is ______________ (mm/dd/yyyy). I hereby release, hold harmless, and indemnify PG&E and its agents from any liability, claims, demands, causes of action, damages, or expenses resulting from: (1) revocation of the authorization to release information to the above designated DRP, (2) any refusal to release information to the DRP pursuant to this revocation, (3) any conduct by the DRP in connection with this revocation, and (4) my failure to timely notify PG&E of the Customer’s disenrollment from my Demand Response services. I also hereby indicate my consent to execute and submit this revocation electronically.

Authorized Signature of DRP
Date Signed (mm/dd/yyyy)
ELECTRIC RULE NO. 24  
DIRECT PARTICIPATION DEMAND RESPONSE  

A. APPLICABILITY

This Rule establishes the terms and conditions that apply to those entities, which are subject to this Rule, who wish to take part in Direct Participation Demand Response Service (“DR Service”). DR Service is offered by the California Independent System Operator (CAISO) and allows a Demand Response Provider (DRP) or a retail customer to participate or “bid-in” directly into the CAISO wholesale market for compensation by the CAISO, in accordance with the market awards and dispatch instructions established by the CAISO.

DRP DR Services under this Rule are subject to the dual participation rules. As a general rule, DRPs are prohibited from registering customer Service Agreements in CAISO’s Relevant Systems that are already registered with another DRP or that are participating in a PG&E event-based demand response program(s). (See Section C.2.d for detailed rules)

1. Entities and Services Subject to Rule 24
   a. PG&E acting on behalf of its customers as the Load Serving Entity (LSE), DRP, Utility Distribution Company (UDC), Meter Data Management Agent (MDMA), or Meter Service Provider (MSP).
   b. Affiliates of PG&E acting as a DRP
   c. Non-Utility affiliated DRPs enrolling PG&E Bundled Service customers.
   d. Bundled Service customers acting as a DRP for their own load.

2. Entities Not Subject to Rule 24
   a. Non-Utility DRPs enrolling only Direct Access (DA), or Community Choice Aggregation (CCA) Service customers,
   b. DA, or CCA Service customers acting as a DRP for their own load,
   c. Electric Service Providers (ESPs) and CCAs acting as a LSE for DA, or CCA Service customers,
   d. Non-Utility affiliated MDMA and MSPs providing metering services to DA Service customers.

The descriptive headings of the various sections of this Rule have been inserted for convenience of reference only and shall in no way define, modify, or restrict any of the terms and provisions thereof.
ELECTRIC RULE NO. 24
DIRECT PARTICIPATION DEMAND RESPONSE

Sheet 3

B. DEFINITIONS

Certain specific terms used in this Rule are defined below. Additional definitions for more widely used terms in PG&E’s tariffs are also found in Electric Rule 1.

1. AFFILIATE: Any legal entity in which five percent or more of the outstanding shares are owned, controlled, or held with power to vote, directly or indirectly either by the DRP or any of its subsidiaries; or by the DRP’s controlling entity or any of its subsidiaries; or by any company in which the DRP, its controlling entity, or any of the DRP’s affiliates, exert substantial control over the operation of the company or indirectly have substantial financial interests in the company which is exercised through means other than ownership. For purpose of this definition, “substantial control” includes, but is not limited to, the possession, directly or indirectly and whether acting alone or in conjunction with others, of the authority to direct or cause the direction of the management or policies of the company. A direct or indirect voting interest of five percent or more by the DRP in an entity’s company creates a rebuttable presumption of control.

For the purposes of this Rule, Utility affiliates participating in DR Services are considered “non-Utility DRPs”.

2. AGGREGATOR: An entity that contracts with end-use customers in multiple locations to help provide them with DR Services. For instance, an Aggregator will consolidate customers’ loads so that they may be placed in a single CAISO demand response resource. An Aggregator will also generally perform customer-facing functions such as customer marketing, communications and payments for participation. An Aggregator might utilize a CAISO DRP to bid DR resources into the CAISO market or elect to become a CAISO DRP itself.

3. CAISO’s DR Service: The CAISO’s wholesale DR market mechanism(s), market model(s), and/or market product(s) that allow retail customers’ loads to be bid in to the CAISO’s wholesale markets.

4. CAISO DEMAND RESPONSE PROVIDER (CAISO-DRP): An entity that is responsible for delivering certain DR Services into the CAISO’s wholesale market and which has undertaken, in writing, by execution of the applicable agreement to comply with all applicable provisions of the CAISO Tariff. CAISO-DRP functions generally include registering customer Service Agreements in the CAISO’s Relevant Systems and working with a Scheduling Coordinator to bid into and settle with the CAISO market.

5. CISR-DRP: The Customer Information Service Request-Demand Response Provider form (Form 79-1152 or its successor) approved by the Commission for customers to authorize the release of their customer information under Section D.1.a. of this rule to a non-Utility DRP or aggregator for purpose of direct participation in the CAISO wholesale market, or the authorized electronic authorization processes on PG&E’s website or from a non-Utility DRP website for customer authorization to release its customer information to the non-Utility DRP, for the purpose of direct participation.

(Continued)
B. DEFINITIONS (CONT’D.)

6. CPUC DEMAND RESPONSE PROVIDER (DRP): An entity that is responsible for performing any or all of the functions associated with either a CAISO-DRP and/or an Aggregator. DRPs serving Bundled customers must register with the CPUC and CAISO DRP’s must also register with the CAISO. Unless otherwise specifically stated, all references to “DRP” herein shall refer to this definition.

Any of the following entities may elect to become a DRP: PG&E, non-Utility entities such as Electric Service Providers (ESPs) and Community Choice Aggregation (CCA) entities who elect to participate in CAISO DR Services with Bundled service customers, a third-party who wishes to bid in Bundled Service Agreements in the CAISO wholesale market, or a Bundled service retail customer (bidding in its own load). Unless otherwise specifically stated, all references to “DRP” herein shall refer to all of these entities.

7. DEMAND RESPONSE (DR): The load reduction and/or increase by retail customers in response to a signal or pricing mechanism. Currently under this tariff, Demand Response is bid into the wholesale market as a Proxy Demand Resource (PDR) or a Reliability Demand Response Resource (RDRR) as defined and offered under CAISO tariffs.

8. DEMAND RESPONSE (DR) SERVICE: DR Service in this Rule generally refers to demand response activities associated with a DRP’s or a customer’s direct participation in the CAISO’s wholesale market where a retail customer, either on its own or enrolled in a DRP’s DR Service, changes its electric demand in accordance with the market awards and dispatch instructions established by the CAISO.

9. DRP’s DR Service: A DR service provided by the DRP to one or more retail customers to bid loads on their behalf into the CAISO wholesale energy market using the CAISO's DR Service(s).

10. EVENT-BASED DEMAND RESPONSE: The dispatchable load reduction or increase by retail customers in response to a day-ahead or day-of event signal.

11. INTERVAL METER: For the purposes of this rule, an “interval meter” is defined as a meter and communication system capable of measuring, storing, and transferring the minimum data required for the CAISO’s settlement processes. Minimum data requirements are specified by the CAISO and vary by the CAISO’s DR Services.
ELECTRIC RULE NO. 24  
DIRECT PARTICIPATION DEMAND RESPONSE

B. DEFINITIONS (CONT’D.)

12. LOCATION: Physical location of the customer’s Service Agreement that is providing demand response.

13. PRICING NODE (PNode): A single network Node or subset of network Nodes where a physical injection or withdrawal of electricity is modeled and for which a Locational Marginal Price is calculated by the CAISO and used for financial settlements. A network Node is a point in the CAISO's Full Network Model representing a physical location within the CAISO's Balancing Authority Area or the CAISO Controlled Grid.

14. RELEVANT CAISO DEMAND RESPONSE SYSTEMS (Relevant Systems): One or more of the information technology (IT) systems that the CAISO uses to complete the necessary steps to allow DRPs to provide DR Services under its tariff. These systems include but are not limited to the CAISO's Demand Response System (DRS) and the Demand Response Registration System (DRRS) and their successors. User Guides can be found on the CAISO's website (www.caiso.com).

15. RESOURCE REGISTRATION: Entry by a DRP of the physical location(s) of one or more retail customer’s loads into the CAISO’s Relevant Systems.

16. REVENUE QUALITY METER DATA (RQMD): Interval Meter Data that has been validated, edited, and estimated in accordance with the Direct Access Standards for Metering and Meter Data (DASMMD) as described in Electric Rule 22.

17. SERVICE AGREEMENT (SA): For the purposes of this Rule, a customer’s Service Agreement refers to a PG&E-specific identifier for tracking and measuring energy service deliveries for retail billing purposes of a specific load associated to a specific physical Location.

18. SETTLEMENT QUALITY METER DATA (SQMD): SQMD is RQMD that has been processed, aggregated, formatted, and stored pursuant to CAISO’s procedures for CAISO’s settlement and auditing purposes. See CAISO Tariff Appendix A, Master Definitions Supplement.

19. SUB-LAP (S-LAP): A CAISO defined subset of PNodes within a Default Load Aggregation Point (DLAP).

20. TELEMETRY: An electric meter capable of recording, storing, and transferring the minimum data required in accordance with the CAISO’s telemetry technical requirements (current technical requirements are available on the CAISO’s website (at www.caiso.com).

21. UNIQUE CUSTOMER IDENTIFIER: An identifier assigned by the UDC and entered into the CAISO’s Relevant Systems by a DRP. The identifier is specific to a customer’s Service Agreement. PG&E will assign a unique customer identifier for a customer’s Service Agreement.
B. DEFINITIONS (CONT’D.)

22. UTILITY DISTRIBUTION COMPANY (UDC): An entity that owns or operates a distribution system for the delivery of energy to and from the CAISO controlled grid. PG&E is the applicable UDC under this Rule.

Herein, the “Utility” is PG&E and it may serve one or more of the following functions: UDC, LSE, MDMA, MSP and DRP.

C. GENERAL TERMS

1. General Obligations of PG&E

a. Non-Discrimination and Competitive Neutrality

   (1) Neutral Discharge of Responsibilities

   PG&E, acting in any capacity described herein, shall discharge its responsibilities in a neutral manner to all DRPs. When acting as an MDMA, this would include ensuring that the Revenue Quality Meter Data (RQMD) for each Service Agreement sent to the DRP meets the current validated, edited, and estimated (VEE) standards established in the Direct Access Standards for Metering and Meter Data (DASMMD).

   Unless otherwise authorized by the California Public Utilities Commission (CPUC or Commission), the Federal Energy Regulatory Commission (FERC), or the affiliate transactions rules¹, PG&E shall not provide or represent that it will provide to itself, its affiliates or customers of itself or its affiliates any preferential treatment with regard to PG&E services than other, unaffiliated, service providers would receive, including, but not limited to, terms and conditions, information, pricing or timing.

¹ D.97-12-088, 77 CPUC 2d 422, 449, as amended by D.98-08-035, 81 CPUC 2d 607 and D.98-12-075, 84 CPUC 2d 155, D.06-06-062 and D.06-12-029.
C. GENERAL TERMS (CONT’D.)

1. General Obligations of PG&E (Cont’d.)

   a. Non-Discrimination and Competitive Neutrality (Cont’d.)

      (2) Non-Discriminatory Response to Requests for PG&E Services

      PG&E, acting in any capacity, shall process requests for similar PG&E services in the same manner and within the same period of time for its affiliates, customers of itself and its affiliates, and for all unaffiliated market participants and their respective customers. PG&E shall provide non-discriminatory access to its meter data, where available, to non-utility DRPs when authorized by the customer. In particular, PG&E shall not have any greater access to meter data for the purposes of fulfilling its DRP duties and obligations than does a non-utility DRP.

      (3) Competitive Neutrality

      Confidential, competitive information received by PG&E from unaffiliated DRPs, or from the CAISO about the DRPs or their customers, in connection with PG&E’s performance of its duties to implement and administer the DRP’s use of PG&E’s Bundled load for DR Services shall be limited to PG&E staff who are responsible for performing PG&E’s non-DRP responsibilities under this Rule. Such confidential, competitive information shall not be used to promote PG&E’s services to its customers or customers of its affiliates.

      PG&E staff receiving such confidential, competitive information from the DRPs or the CAISO in the discharge of PG&E’s roles and responsibilities as a non-DRP shall not share such confidential, competitive information with other individuals in PG&E who are also responsible for discharging PG&E’s roles and responsibilities as a DRP under this Rule.

   b. Timeliness and Due Diligence

      Consistent with state law and CPUC decisions, PG&E acting in any capacity shall exercise due diligence in meeting its obligations and deadlines under this Rule so as to facilitate a customer’s election to participate in a DRP’s DR Service in CAISO’s wholesale markets as quickly as possible.
C. GENERAL TERMS (CONT’D.)

1. General Obligations of PG&E (Cont’d.)

c. Review of DRP Customer Service Agreement(s) in the CAISO’s Relevant Systems

PG&E, acting as a UDC and/or LSE, shall review all customer Service Agreement(s) (within its electric service territory) submitted by a DRP to the CAISO’s Relevant Systems as defined in the CAISO tariff. PG&E’s review shall be limited to ensure accuracy of the customer information presented and that the customer is not otherwise participating in a PG&E event based demand response program at the same time period. PG&E shall also review customer Service Agreement(s) submitted to the CAISO’s Relevant Systems for Entities not subject to this Rule in the same manner contained in this subsection and on the same non-discriminatory basis.

PG&E will conduct such review in accordance with the timelines set forth in the CAISO’s Business Practice Manuals (BPMs). PG&E shall notify the CAISO and the DRP within ten (10) business days if the customer information presented in the registration submitted to the CAISO’s Relevant Systems is inaccurate, if the DRP is not appropriately registered for DRP DR Services at the CPUC, and confirm that the customer Service Agreement does not conflict with the dual participation rules in Section C.2.d. To the extent reasonable and feasible, PG&E and the DRP shall coordinate and cooperate to ensure an accurate registration of the customer Service Agreement.

d. Provision of Customer Data by PG&E

In response to a completed, customer authorized CISR-DRP by a customer or non-Utility DRP, PG&E shall in a timely fashion provide the required information to the DRP to facilitate a customer’s enrollment in a DRP DR Service(s). This information will be provided in accordance with Section D of this Rule. The customer or its authorized DRP may instruct PG&E to terminate the continuous data release at any time by using the revocation processes within the CISR-DRP, which includes the authorized electronic processes included in the definition of CISR-DRP in this rule.

e. PG&E Tariffed Demand Response Programs

For those customers enrolled in a PG&E event-based demand response program, PG&E will act as the customer’s DRP if PG&E elects to submit the customer into the CAISO’s Relevant Systems. This customer could be a PG&E Bundled Service, Direct Access, or Community Choice Aggregation Service customer.
C. GENERAL TERMS (CONT’D.)

1. General Obligations of PG&E (Cont’d.)

   f. KYZ Pulse Installations

   Upon the request of and payment by the customer or its agent, PG&E, acting as the MSP, shall install where feasible a KYZ pulse initiating device or another acceptable telemetry solution. A DRP may, with the permission of the CAISO, use the information from such a device to submit preliminary settlement data to the CAISO. The customer or its DRP will be responsible for the cost of the installation.

   If the customer wishes to terminate the delivery of its KYZ pulse data to the DRP at any time, the DRP will take action, upon receipt of notification from the customer, to discontinue data transmission from its facilities, as soon as practicable, but no later than 45 days after customer notification of termination, to allow for financial settlements to occur.

2. General Obligations of DRPs Enrolling Bundled Service Customers

   This Section is applicable to all DRPs enrolling Bundled Service customers, unless otherwise specified. Requirements for PG&E, acting as the DRP for DA, CA and CCA Service customers, are specified in Section D.

   a. Timeliness and Due Diligence

   DRPs shall exercise due diligence in meeting their obligations and deadlines under this Rule so as to facilitate customer enrollment in DRP DR Service in a timely manner. To the extent ordered by the CPUC, DRPs shall make all payments resulting from CPUC-authorized charges owed to PG&E for services specified under this Rule in a timely manner subject to applicable payment dispute provisions.

   b. Arrangements Between DRPs and Their Customers

   DRPs shall be solely responsible for having appropriate contractual or other arrangements with their customers necessary to implement DRP DR Service consistent with all applicable laws, CAISO requirements, CPUC requirements, if any, and this Rule.

   c. Scheduling Coordinator

   In accordance with the CAISO’s tariff, a DRP must become or contract with a Scheduling Coordinator (SC) prior to customers into the CAISO’s Relevant Systems. PG&E shall not act as an SC on behalf of a non-Utility DRP. The DRP must obtain its own SC to participate in DR Services or otherwise qualify to act in that capacity.

   (Continued)
C. GENERAL TERMS (CONT’D.)

2. General Obligations of DRPs Enrolling Bundled Service Customers (Cont’d.)
   d. Dual Participation

   DRPs are prohibited from placing into the CAISO’s Relevant Systems a customer’s Service Agreement as a Location where the Start Date and End Date for the new Location overlaps with the Start Date and End Date of an existing Location (for the same Service Agreement) that has been given a “Pending”, “Inactive”, “Active”, or “Disputed” status by the CAISO under its rules and procedures. (T)

   Non-Utility DRPs are also prohibited from enrolling and registering a customer Service Agreement in DRP DR Services if the customer is already enrolled in a PG&E event-based demand response program. Additionally, Non-Utility DRPs are also prohibited from enrolling and registering a customer Service Agreement in any other pilot or program that is ineligible to participate with this Rule. The customer can disenroll from the PG&E program at any time if it withdraws to enroll in a DRP DR service. (N)

   When a DRP is notified by PG&E via its CISR-DRP process that a customer is already enrolled in a PG&E event-based DR program, it is the notified DRP’s obligation to ensure that the customer has disenrolled from PG&E’s event-based demand response program before placing the customer Service Agreement in the CAISO’s Relevant System for the same period. The effective date to disenroll that customer from its current program to enroll it in DRP’s DR Service will be established in accordance with PG&E’s demand response program rules and its Electric Rule 12. (T)

   In the event of a conflict between PG&E’s DR program specific requirements and its Electric Rule 12, the program’s tariff requirements will apply. (T)

   For instance, a customer who is currently participating in a PG&E event-based demand response program and wishes to enroll with a non-Utility DRP DR Service must first disenroll from PG&E’s program. Disenrollment will be subject to any contractual or program obligations currently in effect with PG&E’s demand response program. (N)

   Similarly, if a customer is currently registered at the CAISO for DR Services, that customer must be disenrolled prior to that customer’s participation in either another DRP’s registration or a PG&E event-based demand response program. However, a DRP is not prohibited from also enrolling and registering its own customers for other DR Service(s) that it offers. It is the DRP’s obligation to ensure the DRP’s customer Service Agreements do not conflict with the CAISO rules on DR Services. (T)

   (Continued)
C. GENERAL TERMS (CONT’D.)

2. General Obligations of DRPs Enrolling Bundled Service Customers (Cont’d.)

d. Dual Participation (Cont’d)

If a Service Agreement is enrolled in PG&E’s Peak Day Pricing (PDP) program, then the Service Agreement will be scheduled to be automatically disenrolled from PDP when the Service Agreement has been approved by both the UDC and LSE for use in the CAISO’s wholesale market by a non-Utility DRP. Under PG&E’s Electric Rule 12, the earliest disenrollment date for PDP is the customer’s next meter read date. Therefore, for a non-Utility DRP, the Start Date in the CAISO’s Relevant Systems of a Service Agreement that is enrolled in PDP must be greater than or equal to the earliest date on which the Service Agreement could be disenrolled from PDP.

PG&E shall provide a one-digit meter read cycle letter to the non-Utility DRP as also described in Section D.1.a. It is the DRP’s obligation to use the cycle letter and match it for the customer Service Agreement’s next or future meter read date(s) from PG&E’s meter reading schedules. PG&E’s meter reading schedules can be found in http://www.pge.com/myhome/customerservice/smartmeter/analogmeters/schedule/.

If a customer is a residential or small commercial customer, non-Utility DRPs shall notify the customer prior to the registration of the customer’s Service Agreement in the CAISO Relevant System through the Customer Notification Form Letter, required in Section C.7, that the customer will be disenrolled from PDP and may lose bill protection, if applicable.

When PG&E is acting as a DRP, it is obligated to ensure that the customer has disenrolled from non-Utility DRP’s DR Service before enrolling the customer in its own event-based program.

e. Resource Registration of DR Resources at the CAISO

DRPs shall be solely responsible for registering DR resources at the CAISO with the customers to whom they are providing DRP DR Services.

f. Notification of Customer Enrollment in DRP DR Service

The CAISO, through its registration process, will make available to PG&E, as an LSE, the ability to verify its customers’ enrollment status and other information pertinent to the DRP’s customers’ participation in DR Services. DRPs shall not be responsible for providing separate notification to PG&E of an enrollment of a customer in DRP DR Services.

(Continued)
C. GENERAL TERMS (CONT’D.)

2. General Obligations of DRPs Enrolling Bundled Service Customers (Cont’d.)

   g. Utilizing the MDMA for Revenue Quality Meter Data

   DRPs shall utilize the MDMA chosen by the customer (or the customer’s LSE) for gaining access to Revenue Quality Meter Data (RQMD).

   h. Utilizing the MDMA for Settlement Quality Meter Data

   The MDMA shall be responsible and liable to send timely and accurate individual customer RQMD to the DRP, or its designated agent, who shall convert this data to Settlement Quality Meter Data (SQMD) and send it to its Scheduling Coordinator (SC). (See Section F.2 for detailed rules)

   For Direct Access customers, DRPs may contract with the MDMA chosen by the customer (or the customer’s LSE) for submitting SQMD to the DRP’s SC.

   i. Net Benefits Test

   All DRPs bidding Bundled Service customer’s load into the CAISO’s wholesale market using the CAISO’s DR Service(s) must submit bids that are at or above the Net Benefits Test described in Section 30.6.3 of CAISO’s Fifth Replacement FERC Electric Tariff.
C. GENERAL TERMS (CONT'D.)

3. Transfer of Cost Obligations Between DRPs and Customers

Nothing in this Rule is intended to prevent DRPs and customers from agreeing to reallocate between them any costs for DRP’s DR Services that are subject to this Rule to be paid by either of them.

4. LSE Is Not Liable for DRP DR Services

To the extent the customer takes service from a DRP, the customer’s LSE has no obligations to the customer with respect to the services provided by the DRP.

5. DRP is Not Liable for LSE’s Services

The DRP has no obligations to the customer with respect to the services provided by that LSE. The customer must look to its LSE, not the DRP, to carry out the responsibilities associated with those services.

6. Split Loads Not Allowed

Customers requesting DRP DR Service may not partition the electric loads of a Service Agreement among different DRPs at any one time. The entire load and load reduction for a Service Agreement can be registered in the CAISO’s Relevant Systems to only one DRP at any one time.

7. Formal Notification for Residential and Small Commercial Customers

Residential customers are defined as PG&E customers who are eligible for service under one of its residential rate schedules. Small Commercial customers are defined as any non-residential customers with a maximum billing peak demand of less than 20 kilowatt (kW). Non-Utility DRPs intending to enroll Residential and Small Commercial customers in DR Services are required to meet additional CPUC requirements before submitting such customer Service Agreements for Resource Registration at the CAISO Relevant System. These DRPs must obtain approval from the CPUC’s Energy Division for a Customer Notification Form Letter (Form Letter), in hard copy or electronic form, to be provided to each customer explaining the DRP’s terms and conditions of participating in the DRP’s DR Service. If the customer is enrolled in PG&E’s PDF program, the Form Letter shall also provide the estimated disenrollment date from PDP and that the customer may lose bill protection, if applicable. The disenrollment date shall be on the customer’s next or future meter read date (see Section C.2.d)
C. GENERAL TERMS (CONT’D.)

7. Formal Notification for Residential and Small Commercial Customers (Cont’d.)

The non-Utility DRP must provide the Form Letter to the customer before placing its Service Agreement in a DRP’s Resource Registration in the CAISO Relevant System. The Form Letter shall provide any grace period in which the customer can cancel the DR Service enrollment without any charges or penalties.

8. Master Metered Customers

Master metered customers who provide sub-metered tenant billings may participate in DRP DR Service as only a single master Service Agreement. A master-metered customer may not partition the electric loads of a single master meter among several DRPs.

9. Service Fees and Other Charges

PG&E may incur costs in order to facilitate a non-Utility DRPs’ participation in CAISO’s DR Services. Any fees to reimburse PG&E for these costs are described in PG&E rate Schedule E-DRP and must be paid on a timely basis to ensure service under this Rule.
D. ACCESS TO CUSTOMER DATA

1. Access to Customer Usage Data – Release of Information to non-Utility DRPs

PG&E will provide confidential customer-specific information and usage data for a Bundled, DA or CCA service customer to parties specified by that customer, subject to PG&E’s Rule 27, and the following provisions:

a. The inquiring party must have customer authorization pursuant to a CISR-DRP before a customer’s personally identifiable information can be released. The information, upon such authorization, will be released only to the inquiring party, unless otherwise authorized by the customer, as part of the CISR-DRP process. The inquiring party as the recipient of this data agrees to abide by the applicable Commission customer privacy requirements. When PG&E receives an authorized CISR-DRP, PG&E shall transmit the following data to the non-Utility DRP:

(1) Customer Service Agreement information, including service address and rate schedule.

(2) Up to 48 months of historical interval data and monthly billed usages, as it is available for that specific Service Agreement.

(3) Unique Customer Identifier to track the customer Service Agreement in CAISO Relevant Systems. This information will be provided to the customer’s Load Serving Entity (LSE) too if different from PG&E.

(4) Customer one-digit meter read cycle letter for purposes of verifying Meter Read Date and date to begin DR Service.

(5) Ongoing interval usage data and ongoing monthly billed usage.

(6) Confidential end-user information such as customer’s service voltage, the sub-Load Aggregation Point (sub-LAP), Pricing node (Pnode), and the identity and contact information of the customer’s LSE, MDMA and MSP.

(7) PG&E’s demand response program(s) and tariff schedule(s) in which the Service Agreement(s) are currently enrolled and the estimated date of when the customer may be eligible to participate in DR Service without direct financial consequence from PG&E. Applicable PG&E demand response tariffs include: PG&E’s Schedule(s) E-RSAC, E-CSAC, E-SLRP, E-OBMC, E-CBP, E-RSMART, and E-BIP. PG&E will also indicate if the Service Agreement is participating in the PDP option of its applicable rate schedule.

(Continued)
D. ACCESS TO CUSTOMER DATA (CONT’D.)

1. Access to Customer Usage Data – Release of Information to non-Utility DRPs (Cont’d)

(7) For the programs listed above, PG&E shall also provide information, as it is available, on the earliest eligible date(s) on which the customer can leave its current program without any contractual or program obligations under the terms and conditions of the tariff that may result in financial or tariff implications such as but not limited to, losing bill protection or incentive payments, return of received incentives, and/or penalties.

Further, where PG&E has specifically been required to do so, PG&E will indicate if the customer Service Agreement(s) is participating in a PG&E-administered pilot program, known at the time of receipt of the authorized CISR-DRP to potentially cause a conflict with the dual participation rules described in Section C.2.d. An example of such a pilot is PG&E’s Plug-In Electric Vehicle Pilot.

In accordance with Section C.1.c, PG&E, acting in its role as the UDC, will assess whether a customer Service Agreement submitted by a DRP to the CAISO’s Relevant System is participating in a program, pilot or tariff referenced in this section. Programs conflicts are subject to change over time

(8) Basic meter information including the meter number, the type of meter and the intervals currently being collected by the meter.

b. By submitting a CISR-DRP, which includes the authorized electronic process included in the definition of CISR-DRP in this rule:

(1) The customer grants the DRP permission to request that PG&E shorten the interval length of its electric meter(s), as made available by PG&E, for the Service Agreement(s) (when PG&E is the Meter Service Provider for the Service Agreement(s)).

(2) The customer acknowledges and authorizes that if its Service Agreement is on PDP, then the Service Agreement will be scheduled to be automatically disenrolled from PDP when the Service Agreement is approved by both the UDC and LSE for use in the CAISO’s wholesale market by a non-utility DRP. Further, the customer agrees that it will bear any resulting financial consequences, including without limitation, loss of bill protection, incentive payments, and return of incentives.
D. ACCESS TO CUSTOMER DATA (CONT’D.)

1. Access to Customer Usage Data – Release of Information to non-Utility DRPs (Cont’d)

   c. Durations by which the non-Utility DRP may continue to receive access to a customer’s information shall be specified by the customer in the CISR-DRP. The customer may choose: (1) indefinitely until otherwise canceled by the customer or DRP, or (2) a specified time period until otherwise canceled by the customer or DRP. If the customer makes no election, Utility will assume that customer authorization is for an indefinite period of time per CPUC Resolution E-4599.

   If the authorization comes to PG&E via authorized electronic processes from a non-Utility DRP website, that bypasses Form 79-1152, the customer will be offered one of the following time period options: one year, three years, five years, or indefinite. The option offered to the customer will be preselected by the non-Utility DRP as part of its registration process. The customer may accept the non-Utility DRP-offered time period, or the customer may reject the non-Utility DRP-offered time period by not completing the electronic authorization process.

   In the event that the customer, not the non-Utility DRP on the customer’s behalf, revokes access to customer meter data, PG&E shall provide the non-Utility DRP with immediate notice of the revocation.

   It is the non-Utility DRP’s responsibility to notify PG&E to terminate the non-Utility DRP’s access to the customer’s data. Upon receipt of the notice of termination from the non-Utility DRP or the revocation of data access authorization from the customer’s, PG&E will cease to provide the customer on-going interval usage data to the non-Utility DRP. However, the non-Utility DRP may continue to receive data that pertains to the period of time during which customer authorization was valid. This information will assist the non-Utility DRP in settling invoices with the CAISO related to customer Service Agreements during the time that they were active in DR Services.

   d. When PG&E is acting as the MDMA, if daily interval data is available through PG&E’s portals, the daily interval data will not be RQMD. RQMD interval data will be available on a monthly basis.

2. Access to Direct Access or CCA Service Customer Data when PG&E is the DRP but not the MDMA

   a. PG&E, in its role as a DRP, will contract with the customer’s MDMA in order to receive the necessary meter data (as described in Section F) for the purposes of managing its own DRP DR Services program, and to assist in its forecasting, bidding, dispatch, and settlement activities.

   (Continued)
D. ACCESS TO CUSTOMER DATA (CONT’D.)

3. Customer Inquiries Concerning Billing-Related Issues

   a. Customer inquiries concerning PG&E’s charges or services should be directed to PG&E.

   b. Customer inquiries concerning the non-Utility DRP’s charges or services should be directed to the non-Utility DRP.

   c. Customer inquiries concerning the LSE’s charges or services should be directed to the LSE.

4. Customer Inquiries Related to Emergency Situations and Outages

   a. PG&E will be responsible for responding to all inquiries related to distribution service, emergency system conditions, outages, and safety situations. Customers contacting the DRP with such inquiries should be referred directly to PG&E.

   b. It may be necessary for PG&E to shed or curtail customer load at the request of the CAISO, or as otherwise provided by CPUC authorized tariffs. PG&E shall provide notice to the non-Utility DRP of such curtailments as soon as practical, however PG&E is not responsible to notify the non-Utility DRP’s Scheduling Coordinator. Nothing in this rule shall change the criteria for load-shedding established by the CAISO, the CPUC, or PG&E’s operation procedures.

   c. PG&E shall continue to be responsible for implementing its own CPUC-approved DR programs.

E. DRP DR SERVICE ESTABLISHMENT

DRPs enrolling bundled service customers must satisfy the following regulatory requirements, as they might apply, before the DRP can provide DRP DR Services in PG&E’s service territory.

1. CPUC Registration Requirements

   a. Execute a Demand Response Provider Service Agreement (DRP Service Agreement – Form No 79-1160) with PG&E.

   b. Satisfy PG&E’s credit requirements as specified in Section H.

   c. Register with the CPUC and maintain a valid DRP registration at the CPUC.
E. DRP DR SERVICE ESTABLISHMENT (CONT’D)

1. CPUC Registration Requirements (Cont’d)

d. Complete the CPUC DRP Registration Application Form. DRPs enrolling PG&E’s residential and small commercial customers shall also provide the CPUC a performance bond under the name of the CPUC as a security deposit or financial guarantee bond in an amount pursuant to the matrix below and as specified in the CPUC Registration form.

<table>
<thead>
<tr>
<th>Number of Customers</th>
<th>Security Deposit Amount</th>
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<td>1 – 2,500</td>
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<tr>
<td>2,501 - 5,000</td>
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<td>$75,000</td>
</tr>
<tr>
<td>10,001 +</td>
<td>$100,000</td>
</tr>
</tbody>
</table>

2. Maintenance of DRP Registration at the CPUC

a. The CPUC will post the list of registered DRPs on its website. The CPUC will enforce all rules for the DRP registration and may suspend or revoke a DRP registration if the CPUC determines that the DRP violated Rule 24 or terms and conditions outlined in the CPUC DRP Registration Form. The CPUC may require that the DRP periodically renew its registration to maintain its status.

b. The CPUC will investigate complaints relative to DRP activities and may suspend or revoke a DRP registration if a civil or business court, or the CPUC, finds that the DRP has engaged in activities that warrant such action, after appropriate due process considerations. The CPUC may also allow the DRP to cure any identified deficiencies or inappropriate activities within a reasonable period of time.

c. DRPs shall keep the CPUC registration information up to date.
E. DRP DR SERVICE ESTABLISHMENT (CONT’D)

3. CAISO Requirements

All DRPs enrolling PG&E Bundled Service customers must:

a. Execute the necessary agreements for registering resources with the CAISO.

b. Meet all the CAISO’s requirements for the DRP and maintain their registration at the CAISO as a qualified DRP.

F. METERING SERVICES

Metering Services are comprised of three primary functions: Meter Ownership, Meter Services (installation, maintenance, and testing), and MDMA services. Each participating DRP DR Service customer must have an interval meter capable of meeting CAISO DR Service requirements being read remotely by PG&E when acting in its capacity as MDMA.

1. Meter Changes

If a meter change is required to participate in DRP DR Services (i.e. the existing meter is not an appropriate interval meter), and PG&E is the MSP, the customer and DRP have choices for how to proceed:

a. The customer may be scheduled to receive an interval meter as part of PG&E smart meter deployment. In this instance, the customer and DRP can elect to begin DRP DR Services after PG&E completes its deployment of PG&E smart meters and is able to provide the required interval data.

b. If an interval meter with a shorter measurement duration is desired, and such a meter and metering service related back-office capability are readily available from PG&E, PG&E will provide this meter at an additional CPUC-approved fee.
F. METERING SERVICES (CONT’D.)

1. Meter Changes (Cont’d.)

   b. (Cont’d.)

   (1) For Bundled Service and CCA Service Agreements with a maximum demand of 200 kW or greater for at least one month in the past 12 billing months, PG&E will provide and install the metering and communication equipment at no cost to the customer.

   (2) For Bundled Service and CCA Service Agreements whose maximum billed demand has not exceeded the level specified in item 1 above, the customer can elect one of the following:

      i. Pay the cost to have PG&E install an appropriate interval meter that is not a SmartMeter interval meter at the customer’s expense pursuant to Electric Rule 2, Special Facilities, or

      ii. If the PG&E SmartMeter requirements meet CAISO DR Services metering standards, wait until a PG&E SmartMeter is installed and remote-read enabled.

   c. For Direct Access Service Agreements where PG&E is the Meter Data Management Agent (MDMA), no incremental fees under this rule are required. Metering services shall be provided pursuant to Electric Rule 22.

   d. For Direct Access Service Agreements where PG&E is the MSP but not the MDMA, then the customer will be responsible for any and all costs associated with providing acceptable interval data to the DRP, including costs for any additional metering, communication equipment, and fees assessed by the customer’s Electric Service Provider (ESP).

   e. PG&E is not required to install an interval meter and communication equipment or SmartMeter to provide remote read capability if the installation is impractical or not economically feasible.

   f. PG&E shall endeavor to complete the meter change request within fifteen (15) days of Service Agreement enrollment with the CAISO in the absence of a meter installation backlog or other circumstances beyond PG&E’s control such as, but not limited to, delays in the installation of a communication line to the meter. PG&E shall provide notice of any current meter service backlog and estimate its next available installation date. However, if the DRP or the customer is willing to pay a fee to expedite the installation of the meter, PG&E will endeavor to accommodate the request. The fee shall be consistent with fees adopted by the CPUC.
G. DISCONTINUATION OF SERVICE BY DRP

1. Service Changes at the Individual Customer Level

The DRP may elect to discontinue providing DRP DR Service to its customers, or the customer may elect to disenroll from the program pursuant to any agreement between the DRP and its customers. Should the customer terminate electric service with PG&E, the customer is responsible for terminating its arrangement with the DRP directly. For customers who change their LSE, the DRP is responsible for effectuating necessary changes in the CAISO’s Relevant Systems.

2. Service Changes at the CAISO Resource Registration Level

A customer enrolled as part of a Resource Registration at the CAISO may have its DRP DR Service discontinued by its DRP due to the following conditions:

a. The CPUC terminates or revokes the DRP’s registration or its ability to participate in CAISO’s DR Services

b. The CPUC issues an order that otherwise prohibits the DRP from entering into a DRP Service Agreement (Form 79-1160);

c. The DRP has materially breached its obligations under the terms and conditions of the DRP Service Agreement;

d. The DRP exercises its contractual right to terminate the DRP Service Agreement;

e. The DRP is no longer authorized by the CAISO to provide DR Services.

f. The CPUC revokes the Utilities’ authority to participate in DR Service(s) activities.

3. Discontinuation of DRP DR Service by the DRP

a. The DRP is responsible for notifying the LSE, PG&E, SC and MDMA, if impacted, when it will discontinue DRP DR Service to the customer.

b. If the DRP elects to discontinue offering DRP DR Services, the DRP shall also notify the CAISO and the CPUC of its decision to do so and specify the date(s) on which service will be discontinued. The DRP will effect a termination of its Resource Registration with the CAISO;

(T)

c. If the DRP is no longer able to provide DRP DR Service because its authorization to do so has been terminated or revoked, the DRP shall notify the impacted parties (LSEs, PG&E, SC, MDMA), the CAISO and the CPUC unless they are already involved in the decision on such revocation or termination.

(Continued)
G. DISCONTINUATION OF SERVICE BY DRP (CONT’D.)

3. Discontinuation of DRP DR Service by the DRP (Cont’d.)

d. When a non-Utility DRP disenrolls a customer, the non-Utility DRP must notify the customer and PG&E that it will be revoking the customer’s authorization to transmit its data to the Non-Utility DRP upon such disenrollment date.

H. NON-UTILITY DRP CREDIT REQUIREMENTS REQUIRED BY PG&E

1. PG&E may require the non-Utility DRP enrolling Bundled Service customers to establish and maintain its creditworthiness through evaluations, deposits, or other security in the manner described in Section H.2, to the extent the CPUC approves the ability for PG&E to levy charges for services rendered as a result of DR activities. That is, the creditworthiness only applies to charges that are billed by PG&E directly to the non-Utility DRP. The method of determining the amount of credit that a DRP would need to submit in order to initiate services within PG&E’s service territory shall be equal to two times the estimated or actual monthly CPUC-approved fees for DRP DR Service, as described herein and as verified by PG&E. The non-Utility DRP will be obliged to provide the CPUC with a separate performance bond as part of its registration process for Residential and Small Commercial customers.

2. The non-Utility DRP may establish its creditworthiness with PG&E through any one of the following:

   a. Credit Evaluation

   A non-Utility DRP with a demonstrable current credit rating of Baa2 or higher from Moody’s or BBB or higher from Standard and Poor’s, or Fitch is deemed to be creditworthy unless PG&E determines that a material change in the non-Utility DRP’s creditworthiness has occurred. PG&E requires the non-Utility DRP to complete a credit application including financial information reasonably necessary to establish credit. The creditworthiness evaluation may be conducted by an outside credit analysis agency, determined by PG&E, with final credit approval granted by PG&E. This evaluation will be completed within ten (10) business days. Credit reports will remain strictly confidential between the credit analysis agency and PG&E, except to the extent PG&E is required to disclose to the CPUC or its agents. A credit application processing fee, as approved by the CPUC, may be charged to offset the cost of determining the non-Utility DRP’s creditworthiness.
I. COMPLIANT AND DISPUTE RESOLUTION PROCESSES (CONT’D.)

2. Suspension or Revocation of Non-Utility DRP’s Registration at the CPUC

Pursuant to the Commission’s authority provided by California Public Utilities Code Sections 451, and 701 through 702, the CPUC’s enforcement authority includes; but is not limited to, suspension or revocation of non-Utility DRP registration and imposition of penalties and/or fines after appropriate due process. The CPUC’s Consumer Affairs Branch (CAB) shall process and report to the Commission all informal consumer complaints against non-Utility DRPs on a quarterly basis.

If CAB staff determines, after consultation with Energy Division staff and facilitating mediation between a retail customer complainant and a non-Utility DRP, that a resolution cannot be reached, the complaint may be escalated to the CPUC’s Safety and Enforcement Division (SED). SED may consider taking appropriate enforcement action, including proposing for Commission consideration the suspension and/or revocation of the non-Utility DRP’s registration, and fines and/or penalties against the non-Utility DRP. SED will notify the non-Utility DRP, the CAISO, the relevant LSEs, and the UDC of such pending adverse action. The non-Utility DRP that is the subject of the SED action may respond to such action consistent with the procedures provided in the Commission’s Rules of Practice and Procedure.

This process does not exclude alternative means of investigation of complaints regarding non-Utility DRPs as provided by the CPUC’s Rules of Practice and Procedure. Information regarding formal and informal complaint processes is available through the CPUC’s Public Advisor’s Office or at www.cpuc.ca.gov.

Grounds for potential suspension or revocation of non-Utility DRP’s registration and/or penalties or fines are based on the statutes cited in this section and the Commission Decisions (D.) 12-11-025 and 13-12-029. Examples of conduct that may violate these authorities include, but are not limited to:

- Forged Rule 24 forms and other required documents or equivalent electronic process; (T)
- Use of deceptive or unclear advertisements or terms and conditions in contracts and customer letter; (T)
- Improper registration for servicing residential and small commercial customers (see DRP Registration Application Form);
- Failure in notifying customers when servicing residential and small commercial customers (see Section C.7);
- Failure in notifying PG&E and other impacted entities of a customer discontinuation of DR Services (see Section G.3);
- Violation of dual participation rules (see Section C.2.d)
- Non-payment of PG&E fees or credit/performance bond lapse. (see Sections E.1 and H).

(Continued)
I. COMPLIANT AND DISPUTE RESOLUTION PROCESSES (CONT’D.)

2. Suspension or Revocation of Non-Utility DRP’s Registration at the CPUC (Cont’d.)

h. Unauthorized data transfer of customer specific data to others (see Section D.1.d);

i. Invalid DRP Service Agreement (Form 79-1160) with PG&E and the CAISO (see Section E);

j. Failure to fulfill the mutually agreed-upon terms and conditions, e.g., non-payment to the enrolled customers for services rendered (See Customer Notification Form Letter).

k. Provision of faulty or misleading equipment/data to the customer by the DRP to the detriment of the customer.

l. Maintenance of sufficient bond amount.

3. Appeal of a non-Utility DRP Suspension or Revocation at the CPUC

A non-Utility DRP may appeal in writing to the CAB regarding notification of suspension, revocation, or immediate revocation. To appeal the notification, the disqualified entity must first contact the CAB within thirty (30) days to discuss the issue. If the revoked entity has new information to provide the CAB, then it must be provided to CAB within thirty (30) days. If the revoked entity and the CAB cannot resolve the dispute, then the revoked entity can file a complaint using the CPUC’s Formal Complaint process. Information on the formal Complaint process is available through the Public Advisor’s Office at the CPUC or on CPUC’s website: www.cpuc.ca.gov.

J. ACRONYMS

The following acronyms are used within this Rule 24:

(BPM) - Business Practice Manual

(CAB) - CPUC’s Consumer Affairs Branch

(CAISO) - California Independent System Operator

(CCA) - Community Choice Aggregation

(CISR-DRP) - Customer Information Service Request for Demand Response Providers

(CPUC) - California Public Utilities Commission

(DA) - Direct Access

(Continued)
ELECTRIC RULE NO. 24
DIRECT PARTICIPATION DEMAND RESPONSE

J. ACRONYMS (CONT’D.)

(DASMM) - Direct Access Standards for Metering and Meter Data
(DLAP)  - Default Load Aggregation Point
(DR)    - Demand Response
(DRP)   - Demand Response Provider
(DRS)   - Demand Response System
(DRRS)  - Demand Response Registration System
(ESP)   - Electric Service Provider
(FERC)  - Federal Energy Regulatory Commission
(LSE)   - Load Serving Entity
(MDMA)  - Meter Data Management Agent
(MSP)   - Meter Service Provider
(Open ADE) - Open Automated Data Exchange
(PDP)   - Peak Day Pricing
(RQMD)  - Revenue Quality Meter Data
(SA)    - Service Agreement
(SC)    - Scheduling Coordinator
(S-LAP) - Sub Load Aggregation Point
(SQMD)  - Settlement Quality Meter Data
(UDC)   - Utility Distribution Company
(VEE)   - Validated, Edited, and Estimated
## ELECTRIC TABLE OF CONTENTS

### Sheet 1

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<td>40664, 35423, 40152, 37737, 34373, 37727, 40153-E</td>
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<td>37165, 36649, 41080-E (T)</td>
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<table>
<thead>
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<th>FORM</th>
<th>TITLE OF SHEET</th>
<th>CAL P.U.C. SHEET NO.</th>
</tr>
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<td>Electric Service Provider (ESP) Service Agreement</td>
<td>32812-E</td>
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<td>79-1011</td>
<td>Notice to Return to PG&amp;E Bundled Service</td>
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<td>79-1014</td>
<td>Direct Access Customer Relocation Declaration</td>
<td>32411-E</td>
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<td>79-1116</td>
<td>Customer Assignment Notification</td>
<td>34617-E</td>
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<td>79-1117</td>
<td>Six Month Notice to Transfer to Direct Access Service</td>
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Sample Forms
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Non-Disclosure Agreement                                                                                       35299-E
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(Continued)
Attachment 2

Redline Tariffs
IMPORTANT INFORMATION FOR CUSTOMERS – BE SURE TO READ FIRST
THIS IS A LEGALLY BINDING CONTRACT – READ IT CAREFULLY

Pacific Gas and Electric Company’s (PG&E’s) Electric Rule 27 and its corresponding privacy policies, can be found at www.pge.com/about/company/privacy/customer, generally do not allow for the disclosure of customers’ personal information, such as your name, address, phone number, or electric or gas account and billing information, to third parties unless you expressly authorize us to do so. This form allows you to exercise your right to disclose your personal electricity-related information to up to two third-party Demand Response Providers (DRPs), pursuant to PG&E’s Electric Rule 24 (Rule 24), so that you may obtain Demand Response services offered by DRP(s), pursuant to PG&E’s Electric Rule 24, which can be accessed at www.pge.com/tariffs/tm2/pdf/ELEC_RULES_24.pdf. This form may be used for authorization to release Bundled Community Choice Aggregation (CCA), and Direct Access (DA) customer’s information. In some cases two different DRPs may work in concert to help a customer obtain Rule 24 Demand Response services. Accordingly, this form allows for disclosure of your information about you to both a First DRP and an optional Second DRP. Alternatively, each DRP may submit its own CISR-DRP forms with your consent to receive personal information about you. Once you authorize access by the DRP(s) to your personal information, you are responsible for ensuring that the DRP(s) safeguards this information from further disclosure without your consent. Authorization for PG&E to release your information under Rule 24 is separate from commitments you may have or may make with the DRP(s) for their services.

This form also grants the First DRP the ability to request that PG&E make limited changes to the PG&E electric meter(s) serving your Service Agreement(s), as specified in Section CB below.

I, (Customer),

<table>
<thead>
<tr>
<th>Customer Name According To PG&amp;E Records</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact First-Name (if different from above)</td>
<td>FirstLast</td>
</tr>
<tr>
<td>Contact Last-Name</td>
<td></td>
</tr>
<tr>
<td>Title (If Applicable)</td>
<td></td>
</tr>
<tr>
<td>Mailing Address</td>
<td></td>
</tr>
<tr>
<td>Mailing City</td>
<td>Mailing-State</td>
</tr>
<tr>
<td>Mailing Country</td>
<td>USA</td>
</tr>
<tr>
<td>Mailing Address</td>
<td></td>
</tr>
<tr>
<td>E-Mail Address</td>
<td></td>
</tr>
<tr>
<td>Phone-Number</td>
<td></td>
</tr>
</tbody>
</table>

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

Do hereby ☐ AUTHORIZE ☐ REVOKE (check only one) the following DRP(s):

<table>
<thead>
<tr>
<th>Name of First DRP</th>
<th>PG&amp;E Rule 24 ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact First-Name</td>
<td></td>
</tr>
<tr>
<td>Contact Last-Name</td>
<td></td>
</tr>
<tr>
<td>Mailing Address</td>
<td></td>
</tr>
<tr>
<td>Mailing City</td>
<td>Mailing-State</td>
</tr>
<tr>
<td>Mailing Country</td>
<td>USA</td>
</tr>
<tr>
<td>Mailing Address</td>
<td></td>
</tr>
<tr>
<td>E-Mail Address</td>
<td></td>
</tr>
<tr>
<td>Phone-Number</td>
<td></td>
</tr>
</tbody>
</table>

(Complete the following table only if the customer is authorizing data to be additionally released to one additional separate DRP)
<table>
<thead>
<tr>
<th>Name of Second DRP</th>
<th>PG&amp;E Rule 24 ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-Mail</td>
<td>Phone</td>
</tr>
<tr>
<td>Name of Second DRP</td>
<td></td>
</tr>
<tr>
<td>Contact First</td>
<td></td>
</tr>
<tr>
<td>Contact Last</td>
<td>PG&amp;E Rule 24 ID</td>
</tr>
<tr>
<td>Mailing Address</td>
<td></td>
</tr>
<tr>
<td>Mailing City</td>
<td>Mailing State</td>
</tr>
<tr>
<td>Mailing Address</td>
<td>Postal Code</td>
</tr>
<tr>
<td>E-Mail</td>
<td>Phone</td>
</tr>
</tbody>
</table>

Access to the following electric Service Agreements:

<table>
<thead>
<tr>
<th>SERVICE ADDRESS STREET ADDRESS</th>
<th>SERVICE CITY</th>
<th>SERVICE AGREEMENT ID</th>
</tr>
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<tbody>
<tr>
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</tbody>
</table>

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

B. ______________

C. ______________

D. To grant DRP(s) access to your personal information, please sign Section F and Section I (if applicable). If your authorization is being revoked, please complete Sections J.

B. SUMMARY OF INFORMATION AUTHORIZED TO BE RELEASED

I, (Customer), authorize PG&E to disclose to the above DRP(s) for the Service Agreements(s) listed above or attached to this form: 1) customer agreement and account information (e.g., name, Service Agreement ID, service address, rate schedule), 2) access up to 48 months historical and ongoing current electric interval meter data and/or monthly usage data, 3) current PG&E demand response programs in which you are known to participate, and 4) the other information identified in Section D of Electric Rule 24.

E.C. CHANGES YOU AUTHORIZE THE DRP TO MAKE ON YOUR BEHALF—MANDATORY ACTS AUTHORIZED

I, (Customer), grant the First DRP permission to request that PG&E shorten the interval length of my electric meter(s), as made available by PG&E, for the Service Agreement(s) listed above or attached to this form, (when the DRP has successfully registered my Service Agreement in with the CAISO Demand Response Systems, if PG&E is the Meter Service Provider for the Service Agreement(s)). The timeframe for this Authorization is specified in Section C below.

I, (Customer), grant the above DRP(s) permission to revoke this authorization on my behalf and a revocation submitted by any one party shall revoke this Authorization for all of the other parties to this authorization. I, (Customer), understand and agree that if I am on Peak Day Pricing (PDP), then I will automatically be unenrolled from PDP when either the First or Second DRP enters my Service Agreement into the CAISO’s Demand Response systems. I agree to bear any resulting financial consequences, including without limitation, loss of bill protection, incentive payments, and return of incentives. The timeframe for this Authorization is specified in Section C below.

This agreement at all times shall be subject to such modifications and access to information as the California Public Utilities Commission may direct from time to time in the exercise of its jurisdiction.
CUSTOMER INFORMATION SERVICE REQUEST FOR DRP (CISR-DRP)

F.D. TIMEFRAME OF AUTHORIZATION CUSTOMER AGREEMENT

I, (Customer), authorize the actions and changes to be made (or undertaken) by PG&E that my information may be transmitted to the First or Second DRP(s) even after the Authorization has ended. Such post-authorization data transfers will be limited to updates to the data for the time period during which this Authorization was valid. In all cases, the Authorization for a Service Agreement will be automatically revoked when the Service Agreement is closed.

I, (Customer), understand and agree that if I am on Peak Day Pricing (PDP), then I will automatically be unenrolled from PDP when my Service Agreement has been successfully setup by the DRP in the CAISO’s Demand Response systems. I agree to bear any resulting financial consequences, including without limitation, loss of bill protection, incentive payments, and return reimbursements to PG&E of incentives related to my participation in PDP, or other PG&E DR programs, or DR enabling technology.

I, (If not Customer of Record), declare that I am authorized to execute this Authorization manually or electronically on behalf of the Customer of Record listed at the top of this form and that I have authority to financially bind the Customer of Record. I understand PG&E reserves the right to verify any authorization request submitted before releasing information or taking any action on my behalf.

I understand PG&E reserves the right to verify any authorization request submitted before releasing information or taking any action on my behalf. I hereby release, hold harmless, and indemnify PG&E from any liability, claims, demands, and causes of action, damages, or expenses resulting from: (1) any release of information to the DRP pursuant to this Authorization; (2) the unauthorized use of this information by the DRP or any third party; and (3) any actions taken by the DRP pursuant to this Authorization. I understand that I may revoke this Authorization at any time by submitting a newly completed copy of this form with the revoke check box selected. I hereby indicate my consent to execute and submit this authorization electronically. (Check only one option below.)

Authorized Signature of Customer or Agent

Date Signed (mm/dd/yyyy)
BEGINNING ______________________ (mm/dd/yyyy) AND CONTINUING UNTIL ______________________ (mm/dd/yyyy).

☐ Indefinitely until I revoke this Authorization. This revocation will apply to both the First and Second DRP(s) (if applicable).

☐ Indefinitely until the First or Second DRP instructs, or I instruct, PG&E to revoke the Authorization. A revocation submitted by any one party shall revoke the Authorization for all of the other parties.

G. TRANSMITTAL OF RELEASED CUSTOMER INFORMATION TO DRP (TO BE COMPLETED BY DRP)

The daily interval data and monthly electric meter usage data for bill calculations will be delivered via PG&E’s Share My Data platform.

The remaining information (other than daily interval and monthly usage data) will be delivered via one of the following methods: (check only one)

☐ Hard copy via US Mail: ______________________

☐ Facsimile at this telephone number: ______________________

☐ Secured email ______________________ (may be different than e-mail address listed on Page 1), or secure electronic format via a secured data transmission platform (e.g. ESFT file).

H. JURISDICTION OF CPUC

This agreement at all times shall be subject to such modifications and access to information as the California Public Utilities Commission may direct from time to time in the exercise of its jurisdiction.

I. CUSTOMER AUTHORIZATION

I, (Customer), declare under penalty of perjury under the laws of the State of California that I am authorized to execute this agreement on behalf of the Customer of Record listed at the top of this form and that I have authority to financially bind the Customer of Record. I understand PG&E reserves the right to verify any authorization request submitted before releasing information or taking any action on my behalf. I authorize PG&E to release the requested information specified in Sections A and B for my Service Agreement(s) to the above-designated DRP(s). I hereby release, hold harmless, and indemnify PG&E from any liability, claims, demands, and causes of action, damages, or expenses resulting from: (1) any release of information to the DRP(s) pursuant to this Authorization; (2) the unauthorized use of this information by the DRP(s); and (3) any actions taken by the DRP(s) pursuant to this Authorization. I understand that I may cancel this Authorization at any time by submitting a revocation request using this same form.

________________________________________  ______________________________________
Authorized Signature of Customer  Date Signed (mm/dd/yyyy)

J.E. FIRST DRP’S AGREEMENT REGARDING CUSTOMER RELEASE AUTHORIZATION

ACCEPTANCE OF CUSTOMER RELEASE PROVISION

I, (First DRP), hereby agree to comply with this agreement, and to release, hold harmless, and indemnify PG&E from any liability, claims, demand, causes of action, damages, or expenses resulting from the use of customer information obtained pursuant to this Authorization. I hereby indicate my consent to execute and submit this authorization electronically.

________________________________________  ______________________________________
Authorized Signature of First DRP  Date Signed (mm/dd/yyyy)

K.F. SECOND DRP’S AGREEMENT REGARDING CUSTOMER RELEASE AUTHORIZATION

ACCEPTANCE OF CUSTOMER RELEASE PROVISION

I, (Second DRP), hereby agree to comply with this agreement, and to release, hold harmless, and indemnify PG&E from any liability, claims, demand, causes of action, damages, or expenses resulting from the use of customer information obtained pursuant to this Authorization. I hereby indicate my consent to execute and submit this authorization electronically.
CUSTOMER INFORMATION SERVICE REQUEST FOR DRP (CISR-DRP)

Authorized Signature of Second DRP

Date Signed (mm/dd/yyyy)

G. JURISDICTION OF CPUC
This agreement at all times shall be subject to such modifications and access to information as the California Public Utilities Commission may direct from time to time in the exercise of its jurisdiction, including, without limitation, revisions to the types of customer information to be released under Rule 24.

FOR REVOCATION USE ONLY

L. CUSTOMER AUTHORIZATION TO ALLOW DRP(S) TO REVOKE AUTHORIZATION (Complete this section only if you authorized, in Section C, the DRP(s) (as listed above) to revoke this authorization.) I (Customer), declare under penalty of perjury under the laws of the State of California that I am authorized to execute this document on behalf of the Customer of Record listed at the top of this form and that I have authority to financially bind the Customer of Record. I hereby authorize the DRP(s) (as listed above) to revoke this authorization to release information to the First and Second DRP(s) (as listed above). Further, I hereby authorize the DRP(s) (as listed above) to notify PG&E when the Customer of Record disenrolls from the DRP(s) demand response program. The Customer of Record hereby releases, holds harmless, and indemnifies PG&E from any liability, claims, demands, causes of action, damages, or expenses resulting from: (1) any negligent conduct relating to delegation of authority to revoke the authorization; (2) from any refusal to release information to the First and Second DRP(s) (as listed above) pursuant to this revocation; and, (3) for any conduct by the First and Second DRP(s) or (as listed above) in connection with this revocation.

M. ________Complete Below Only When REVOKING Data Release Authorization________

N.H. CUSTOMER REVOCATION OF AUTHORIZATION
1. (Customer), declare that I am authorized to execute this Revocation manually or electronically on behalf of the Customer of Record listed at the top of this form and that I have authority to financially bind the Customer of Record. I hereby revoke the authorization to release information to the DRP listed above. I hereby release, hold harmless, and indemnify PG&E from any liability, claims, demands, causes of action, damages, or expenses resulting from: (1) any negligent conduct relating to this revocation; (2) any refusal to release information to the DRP pursuant to this revocation; and (3) any conduct by the DRP in connection with this revocation. I hereby indicate my consent to execute and submit this revocation electronically. I (Customer), declare under penalty of perjury under the laws of the State of California that I am authorized to execute this document on behalf of the Customer of Record listed at the top of this form and that I have authority to financially bind the Customer of Record. I hereby revoke the authorization to release information to the DRP(s) listed above. I hereby release, hold harmless, and indemnify PG&E from any liability, claims, demands, causes of action, damages, or expenses resulting from: (1) any negligent conduct relating to this revocation; (2) any refusal to release information to the DRP(s) pursuant to this revocation; and (3) any conduct by the DRP(s) in connection with this revocation.

Authorized Signature of Customer or Agent

Date Signed (mm/dd/yyyy)

O.I. DRP REVOCATION OF AUTHORIZATION/DISENROLLMENT FROM DRP(S) DEMAND RESPONSE SERVICE
1. (DRP), hereby revoke the authorization to release the Customer’s information to the above designated DRP. Further, I hereby notify PG&E that the date of the Customer’s actual or anticipated disenrollment from my Demand Response services is _____________ (mm/dd/yyyy). I hereby release, hold harmless, and indemnify PG&E and its agents from any liability, claims, demands, causes of action, damages, or expenses resulting from: (1) revocation of the authorization to release information to the above designated DRP, (2) any refusal to release information to the DRP pursuant to this revocation, (3) any conduct by the DRP in connection with this revocation, and (4) my failure to timely notify PG&E of the Customer’s disenrollment.
from my Demand Response services. I also hereby indicate my consent to execute and submit this revocation electronically. I, (DRP), have been authorized under Section I above to revoke the authorization to release information of the Customer of Record listed at the top of this form to the First and Second DRP(s) (as listed above), and to notify PG&E when the Customer of Record disenrolls from the DRP(s) demand response service. I hereby revoke the authorization to release information to the DRP(s) listed above. Further, I hereby notify PG&E that the date of the Customer’s actual or anticipated disenrollment from my Demand Response services is ______ (mm/dd/yyyy). I hereby release, hold harmless, and indemnify PG&E from any liability, claims, demands, causes of action, damages, or expenses resulting from revocation of the authorization to release information to the DRP(s) listed above, and/or from my failure to timely notify PG&E of the Customer’s disenrollment from my Demand Response services. I understand that this revocation will apply to both the First and Second DRPs.

_________________________  _________________________
Authorized Signature of DRP  Date Signed (mm/dd/yyyy)
A. APPLICABILITY

This Rule establishes the terms and conditions that apply to those entities, which are subject to this Rule, who wish to take part in Direct Participation Demand Response Service (“DR Service”). DR Service is offered by the California Independent System Operator (CAISO) and allows a Demand Response Provider (DRP) or a retail customer to participate or “bid-in” directly into the CAISO wholesale market for compensation by the CAISO, in accordance with the market awards and dispatch instructions established by the CAISO.

DRP DR Services under this Rule are subject to the dual participation rules. As a general rule, DRPs are prohibited from registering customer service agreements in CAISO’s Relevant Systems that are already registered with another DRP or that are participating in a PG&E event-based demand response program(s). (See Section C.2.d for detailed rules)

1. Entities and Services Subject to Rule 24
   a. PG&E acting on behalf of its customers as the Load Serving Entity (LSE), DRP, Utility Distribution Company (UDC), Meter Data Management Agent (MDMA), or Meter Service Provider (MSP).
   b. Affiliates of PG&E acting as a DRP
   c. Non-Utility affiliated DRPs enrolling PG&E Bundled Service customers.
   d. Bundled Service customers acting as a DRP for their own load.

2. Entities Not Subject to Rule 24
   a. Non-Utility DRPs enrolling only Direct Access (DA), or Community Choice Aggregation (CCA) Service customers,
   b. DA, or CCA Service customers acting as a DRP for their own load,
   c. Electric Service Providers (ESPs) and CCAs acting as a LSE for DA, or CCA Service customers,
   d. Non-Utility affiliated MDMS and MSPs providing metering services to DA Service customers.

The descriptive headings of the various sections of this Rule have been inserted for convenience of reference only and shall in no way define, modify, or restrict any of the terms and provisions thereof.
B. DEFINITIONS

Certain specific terms used in this Rule are defined below. Additional definitions for more widely used terms in PG&E’s tariffs are also found in Electric Rule 1.

1. AFFILIATE: Any legal entity in which five percent or more of the outstanding shares are owned, controlled, or held with power to vote, directly or indirectly either by the DRP or any of its subsidiaries; or by the DRP’s controlling entity or any of its subsidiaries; or by any company in which the DRP, its controlling entity, or any of the DRP’s affiliates, exert substantial control over the operation of the company or indirectly have substantial financial interests in the company which is exercised through means other than ownership. For purpose of this definition, “substantial control” includes, but is not limited to, the possession, directly or indirectly and whether acting alone or in conjunction with others, of the authority to direct or cause the direction of the management or policies of the company. A direct or indirect voting interest of five percent or more by the DRP in an entity’s company creates a rebuttable presumption of control.

For the purposes of this Rule, Utility affiliates participating in DR Services are considered “non-Utility DRPs”.

2. AGGREGATOR: An entity that contracts with end-use customers in multiple locations to help provide them with DR Services. For instance, an Aggregator will consolidate customers’ loads so that they may be placed in a single CAISO demand response resource. An Aggregator will also generally perform customer-facing functions such as customer marketing, communications and payments for participation. An Aggregator might utilize a CAISO DRP to bid DR resources into the CAISO market or elect to become a CAISO DRP itself.

3. CAISO’s DR Service: The CAISO’s wholesale DR market mechanism(s), market model(s), and/or market product(s) that allow retail customers’ loads to be bid into the CAISO’s wholesale markets.

4. CAISO DEMAND RESPONSE PROVIDER (CAISO-DRP): An entity that is responsible for delivering certain DR Services into the CAISO’s wholesale market and which has undertaken, in writing, by execution of the applicable agreement to comply with all applicable provisions of the CAISO Tariff. CAISO-DRP functions generally include enrolling registering customer service Agreement(s) or agreements in the CAISO’s Relevant Systems Demand Response Registration System (DRRS), and working with a Scheduling Coordinator to bid into and settle with the CAISO market.

5. CISR-DRP: The Customer Information Service Request-Demand Response Provider form (Form 79-1152 or its successor) approved by the Commission for customers to authorize the release of their customer information under Section D.-1.-a. of this rule to a non-Utility DRP or aggregator for purpose of direct participation in the CAISO wholesale market, or the authorized electronic authorization processes on PG&E’s website or from a non-Utility DRP website for customer authorization to release its customer information to the non-Utility DRP, for the purpose of direct participation.

(Continued)
B. DEFINITIONS (CONT’D.)

65. CPUC DEMAND RESPONSE PROVIDER (DRP): An entity that is responsible for performing any or all of the functions associated with either a CAISO-DRP and/or an Aggregator. DRPs serving bundled customers must register with the CPUC and CAISO DRP’s must also register with the CAISO. Unless otherwise specifically stated, all references to “DRP” herein shall refer to this definition.

Any of the following entities may elect to become a DRP: PG&E, non-Utility entities such as Electric Service Providers (ESPs) and Community Choice Aggregation (CCA) entities who elect to participate in CAISO DR Services with bundled service customers, a third-party who wishes to bid in bundled service account Service Agreements in the CAISO wholesale market, or a bundled service retail customer (bidding in its own load). Unless otherwise specifically stated, all references to “DRP” herein shall refer to all of these entities.

66. DEMAND RESPONSE (DR): The load reduction and/or increase by retail customers in response to a signal or pricing mechanism. Currently under this tariff, Demand Response is bid into the wholesale market as a Proxy Demand Resource (PDR) or a Reliability Demand Response Resource (RDRR) as defined and offered under CAISO tariffs.

67. DEMAND RESPONSE (DR) SERVICE: DR Service in this Rule generally refers to demand response activities associated with a DRP’s or a customer’s direct participation in the CAISO’s wholesale market where a retail customer, either on its own or enrolled in a DRP’s DR Service, changes its electric demand in accordance with the market awards and dispatch instructions established by the CAISO.

68. DRP’s DR Service: A DR program or service provided by the DRP to one or more retail customers to bid loads on their behalf into the CAISO wholesale energy market using the CAISO’s DR Service(s).

69. EVENT-BASED DEMAND RESPONSE: The dispatchable load reduction or increase by retail customers in response to a day-ahead or day-of event signal.

70. INTERVAL METER: For the purposes of this rule, an “interval meter” is defined as a meter and communication system capable of measuring, storing, and transferring the minimum data required for the CAISO’s settlement processes. Minimum data requirements are specified by the CAISO and vary by the CAISO’s DR Services.
ELECTRIC RULE NO. 24
DIRECT PARTICIPATION DEMAND RESPONSE

B. DEFINITIONS (CONT’D.)

124. LOCATION: Physical location of the customer’s Service Agreement that is providing demand response.

13. PRICING NODE (PNode): A single network Node or subset of network Nodes where a physical injection or withdrawal of electricity is modeled and for which a Locational Marginal Price is calculated by the CAISO and used for financial settlements. A network Node is a point in the CAISO’s Full Network Model representing a physical location within the CAISO’s Balancing Authority Area or the CAISO Controlled Grid.

432142. RELEVANT CAISO DEMAND RESPONSE SYSTEMS (Relevant Systems): One or more of the information technology (IT) systems that the CAISO uses to complete the necessary steps to allow DRPs to provide DR Services under its tariff. These systems include but are not limited to the CAISO’s Demand Response System (DRS) and the Demand Response Registration System (DRRS) and their successors. User Guides can be found on the CAISO’s website (www.caiso.com).

443158. RESOURCE REGISTRATION: Entry by a DRP of the physical location(s) of one or more retail customer’s loads into the CAISO’s Relevant Systems.

454164. REVENUE QUALITY METER DATA (RQMD): Interval Meter Data that has been validated, edited, and estimated in accordance with the Direct Access Standards for Metering and Meter Data (DASMMD) as described in Electric Rule 22.

1765. SERVICE AGREEMENT (SA): For the purposes of this Rule, a customer’s Service Agreement refers to a PG&E-specific identifier for tracking and measuring energy service deliveries for retail billing purposes of a specific load associated to a specific physical Location.

476186. SETTLEMENT QUALITY METER DATA (SQMD): SQMD is RQMD that has been processed, aggregated, formatted, and stored pursuant to CAISO’s procedures for CAISO’s settlement and auditing purposes. See CAISO Tariff Appendix A, Master Definitions Supplement.

487197. SUB-LAP (S-LAP): A CAISO defined subset of PNodes within a Default Load Aggregation Point (DLAP).

498208. TELEMETRY: An electric meter capable of recording, storing, and transferring the minimum data required in accordance with the CAISO’s telemetry technical requirements (current technical requirements are available on the CAISO’s website (at www.caiso.com).

210419. UNIQUE CUSTOMER IDENTIFIER: An identifier assigned by the UDC and entered into the CAISO’s Relevant Systems by a DRP. The identifier is specific
to a customer’s Service Account Agreement. PG&E will assign a unique customer identifier for a customer’s service account or service agreement. Service Agreement.
B. DEFINITIONS (CONT’D.)

2240. UTILITY DISTRIBUTION COMPANY (UDC): An entity that owns or operates a distribution system for the delivery of energy to and from the CAISO controlled grid. PG&E is the applicable UDC under this Rule.

Herein, the “Utility” is PG&E and it may serve one or more of the following functions: UDC, LSE, MDMA, MSP and DRP.

C. GENERAL TERMS

1. General Obligations of PG&E
   a. Non-Discrimination and Competitive Neutrality
      (1) Neutral Discharge of Responsibilities

      PG&E, acting in any capacity described herein, shall discharge its responsibilities in a neutral manner to all DRPs. When acting as an MDMA, this would include ensuring that the Revenue Quality Meter Data (RQMD) for each service agreement sent to the DRP meets the current validated, edited, and estimated (VEE) standards established in the Direct Access Standards for Metering and Meter Data (DASMMD).

      Unless otherwise authorized by the California Public Utilities Commission (CPUC or Commission), the Federal Energy Regulatory Commission (FERC), or the affiliate transactions rules\(^1\), PG&E shall not provide or represent that it will provide to itself, its affiliates or customers of itself or its affiliates any preferential treatment with regard to PG&E services than other, unaffiliated, service providers would receive, including, but not limited to, terms and conditions, information, pricing or timing.

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\(^1\) D.97-12-088, 77 CPUC 2d 422, 449, as amended by D.98-08-035, 81 CPUC 2d 607 and D.98-12-075, 84 CPUC 2d 155, D.06-06-062 and D.06-12-029.
ELECTRIC RULE NO. 24
DIRECT PARTICIPATION DEMAND RESPONSE

C. GENERAL TERMS (CONT’D.)

1. General Obligations of PG&E (Cont’d.)

   a. Non-Discrimination and Competitive Neutrality (Cont’d.)

      (2) Non-Discriminatory Response to Requests for PG&E Services

      PG&E, acting in any capacity, shall process requests for similar PG&E services in the same manner and within the same period of time for its affiliates, customers of itself and its affiliates, and for all unaffiliated market participants and their respective customers. PG&E shall provide non-discriminatory access to its meter data, where available, to third-party non-utility DRPs when authorized by the customer. In particular, PG&E shall not have any greater access to meter data for the purposes of fulfilling its DRP duties and obligations than does a third-party non-utility DRP.

      (3) Competitive Neutrality

      Confidential, competitive information received by PG&E from unaffiliated DRPs, or from the CAISO about the DRPs or their customers, in connection with PG&E’s performance of its duties to implement and administer the DRP’s use of PG&E’s bundled load for DR Services shall be limited to PG&E staff who are responsible for performing PG&E’s non-DRP responsibilities under this Rule. Such confidential, competitive information shall not be used to promote PG&E’s services to its customers or customers of its affiliates.

      PG&E staff receiving such confidential, competitive information from the DRPs or the CAISO in the discharge of PG&E’s roles and responsibilities as a non-DRP shall not share such confidential, competitive information with other individuals in PG&E who are also responsible for discharging PG&E’s roles and responsibilities as a DR under this Rule.

   b. Timeliness and Due Diligence

      Consistent with state law and CPUC decisions, PG&E acting in any capacity shall exercise due diligence in meeting its obligations and deadlines under this Rule so as to facilitate a customer’s election to participate in a DRP’s DR Service in CAISO’s wholesale markets as quickly as possible.
C. GENERAL TERMS (CONT’D.)

1. General Obligations of PG&E (Cont’d.)

c. Review of DRP Customer Service Agreement(s) in the CAISO’s Relevant Systems

PG&E, acting as an a UDC and/or LSE, shall review all customer service agreement(s) (within its electric service territory) submitted by a DRP to the CAISO’s Relevant Systems as defined in the CAISO tariff. PG&E’s review shall be limited to ensure accuracy of the customer information presented and that the customer is not otherwise participating in a PG&E event based demand response program at the same time period. PG&E shall also review customer service agreement submitted to the CAISO’s Relevant Systems for Entities not subject to this Rule in the same manner contained in this subsection and on the same non-discriminatory basis.

PG&E will conduct such review in accordance with the timelines set forth in the CAISO’s Business Practice Manuals (BPMs). PG&E shall notify the CAISO and the DRP within ten (10) business days if the customer information presented in the registration submitted to the CAISO’s Relevant Systems is inaccurate, if the DRP is not appropriately registered for DRP DR Services at the CPUC, and confirm that the customer service agreement does not conflict with the dual participation rules in Section C.2.d. To the extent reasonable and feasible, PG&E and the DRP shall coordinate and cooperate to ensure an accurate registration of the customer service agreement.

d. Provision of Customer Data by PG&E

In response to a completed, customer authorized submittal of PG&E’s Form 79-1152 (CISR-DRP) by a customer or non-Utility DRP, PG&E shall in a timely fashion provide the required information to the DRP to facilitate a customer’s enrollment in a DRP DR Service(s) in a timely fashion. This information will be provided in accordance with Section D of this Rule. The customer or its authorized DRP may also request the timeframe of continuous meter data transmittal as described in Section D.1.d or how. The customer or its authorized DRP may instruct PG&E to terminate the continuous data release at any time by using the revocation processes within the CISR-DRP, which (including the authorized electronic processes included in the definition of CISR-DRP in this rule) shall be terminated.

e. PG&E Tariffed Demand Response Programs

For those customers enrolled in a PG&E event-based demand response program, PG&E will act as the customer’s DRP if PG&E elects to submit the customer into the CAISO’s Relevant SystemsDRS. This customer could be a PG&E Bundled Service, Direct Access, or Community Choice Aggregation

(Continued)
ELECTRIC RULE NO. 24
DIRECT PARTICIPATION DEMAND RESPONSE

Service customer.
C. GENERAL TERMS (CONT’D.)

1. General Obligations of PG&E (Cont’d.)

f. KYZ Pulse Installations

Upon the request of and payment by the customer or its agent, PG&E, acting as the MSP, shall install where feasible a KYZ pulse initiating device or another acceptable telemetry solution. A DRP may, with the permission of the CAISO, use the information from such a device to submit preliminary settlement data to the CAISO. The customer or its DRP will be responsible for the cost of the installation.

If the customer wishes to terminate the delivery of its KYZ pulse data to the DRP at any time, the DRP will take action, upon receipt of notification from the customer, to discontinue data transmission from its facilities, as soon as practicable, but no later than 45 days after customer notification of termination, to allow for financial settlements to occur.

2. General Obligations of DRPs Enrolling Bundled Service Customers

This Section is applicable to all DRPs enrolling Bundled Service customers, unless otherwise specified. Requirements for PG&E, acting as the DRP for DA, CA and CCA Service customers, are specified in Section D.

a. Timeliness and Due Diligence

DRPs shall exercise due diligence in meeting their obligations and deadlines under this Rule so as to facilitate customer enrollment in DRP DR Service in a timely manner. To the extent ordered by the CPUC, DRPs shall make all payments resulting from CPUC-authorized charges owed to PG&E for services specified under this Rule in a timely manner subject to applicable payment dispute provisions.

b. Arrangements Between DRPs and Their Customers

DRPs shall be solely responsible for having appropriate contractual or other arrangements with their customers necessary to implement DRP DR Service consistent with all applicable laws, CAISO requirements, CPUC requirements, if any, and this Rule.

c. Scheduling Coordinator (SC)

In accordance with the CAISO’s tariff, a DRP must become or contract with a Scheduling Coordinator (SC) prior to enrolling customers and registering customers in resources into the CAISO’s Relevant Systems. PG&E shall not act as an SC on behalf of a non-Utility DRP. The DRP must obtain its own SC to participate in DR Services or otherwise qualify to act in that capacity.

(Continued)
C. GENERAL TERMS (CONT’D.)

2. General Obligations of DRPs Enrolling Bundled Service Customers (Cont’d.)

d. Dual Participation

DRPs are prohibited from placing into the CAISO’s Relevant Systems a customer’s service agreement as a Location into the CAISO’s Demand Response (DR) System, where the Start Date and End Date for the new Location overlaps with any time period within the Start Date and End Date of an another existing DRP’s Location (for the same service agreement) registration of the customer’s service agreement and that has been given a “Confirmed”—“Pending”, “Inactive”, “Active”, or “Disputed” status by the CAISO under its rules and procedures.

Non-Utility DRPs are also prohibited from enrolling and registering a customer service agreement in DRP DR Services if the customer is already enrolled in a PG&E event-based demand response program. Additionally, Non-Utility DRPs are also prohibited from enrolling and registering a customer service agreement in any other pilot or program that is ineligible to participate with this Rule in its tariff, contract, or program design. The customer can disenroll from the PG&E program at any time if it withdraws to enroll in a DRP DR service.

When a DRP is notified by PG&E via its CISR-DRP process that a customer is already enrolled in a PG&E event-based DR program, it is the notified DRP’s obligation to ensure that the customer has disenrolled from PG&E’s event-based demand response program before placing the customer service agreement in the CAISO’s Relevant System for the same period. The effective date to disenroll that customer from its current program to enroll it in DRP’s DR Service will be established in accordance with PG&E’s demand response program rules and its Electric Rule 12.

In the event of a conflict between PG&E’s DR program specific requirements and its Electric Rule 12, the program’s tariff requirements will apply.

For instance, a customer who is currently participating in a PG&E event-based demand response program and wishes to enroll with a non-Utility DRP DR Service must first disenroll from PG&E’s program. Disenrollment will be subject to any contractual or program obligations currently in effect with PG&E’s demand response program.

Similarly, if a customer is currently registered at the CAISO for DR Services, that customer must be disenrolled prior to that customer’s participation in either another DRP’s registration or a PG&E event-based demand response program. However, a DRP is not prohibited from also enrolling and registering its own customers for other DR Service(s) that it offers. It is the DRP’s obligation to ensure the DRP’s customer service agreements do not conflict with the CAISO rules on DR Services.

(Continued)
ELECTRIC RULE NO. 24
DIRECT PARTICIPATION DEMAND RESPONSE

C. GENERAL TERMS (CONT'D.)

2. General Obligations of DRPs Enrolling Bundled Service Customers (Cont’d.)

  d. Dual Participation (Cont’d)

If a Customer Service Agreement is enrolled in PG&E’s Peak Day Pricing (PDP) program, then the Service Agreement will be scheduled to be automatically disenrolled from the PDP program when the Service Agreement has been approved by both the UDC and LSE for use in the CAISO’s wholesale market upon registration by a non-Utility DRP of the customer’s service agreement that has been given a “Confirmed” “Inactive” or “Active” status by the CAISO. Under PG&E’s Electric Rule 12, the earliest disenrollment date for Peak Day Pricing (PDP) is the customer’s next meter read date. Therefore, for a non-Utility DRP, the Start Date in the CAISO’s Relevant Systems of a Service Agreement for a non-Utility DRP customer service agreement registration for which the customer service account that is enrolled in Peak Day Pricing (PDP) must be greater than or equal to the next or future meter read date, the earliest date on which the Service Agreement could be disenrolled from PDP.

PG&E shall provide a one-digit meter read cycle letter to the non-Utility DRP via Form 79-1152 (its CISR-DRP process) as also described in Section D.1.a. It is the DRP’s obligation to use the cycle letter and match it for the customer’s service agreement’s next or future meter read date(s) from PG&E’s meter reading schedules. PG&E’s meter reading schedules can be found in http://www.pge.com/myhome/customerservice/smartmeter/analogneters/schedule/.

If a customer is a residential or small commercial customer, non-Utility DRPs shall notify the customer prior to the registration of the customer’s Service Agreement or account in the CAISO Relevant System through the Customer Notification Form Letter, required in Section C.7, that the customer will be disenrolled from Peak Day Pricing (PDP) and may lose bill protection, if applicable.

When PG&E is acting as a DRP, it is obligated to ensure that the customer has disenrolled from non-Utility DRP’s DR Service before enrolling the customer in its own event-based program.

  e. Resource Registration of DR Resources at the CAISO

DRPs shall be solely responsible for registering DR resources at the CAISO with the customers to whom they are providing DRP DR Services.

  f. Notification of Customer Enrollment in DRP DR Service

The CAISO, through its registration process, will make available to PG&E, as an LSE, the ability to verify its customers’ enrollment status and other
ELECTRIC RULE NO. 24
DIRECT PARTICIPATION DEMAND RESPONSE

(Continued)

information pertinent to the DRP's customers’ participation in DR Services. DRPs shall not be responsible for providing separate notification to PG&E of an enrollment of a customer in DRP DR Services.
C. GENERAL TERMS (CONT’D.)

2. General Obligations of DRPs Enrolling Bundled Service Customers (Cont’d.)
   
g. Utilizing the MDMA for Revenue Quality Meter Data

   DRPs shall utilize the MDMA chosen by the customer (or the customer’s LSE) for gaining access to Revenue Quality Meter Data (RQMD).

   h. Utilizing the MDMA for Settlement Quality Meter Data

   The MDMA shall be responsible and liable to send timely and accurate individual customer RQMD to the DRP, or its designated agent, who shall convert this data to Settlement Quality Meter Data (SQMD) and send it to its Scheduling Coordinator (SC). (See Section F.2 for detailed rules)

   For Direct Access customers, DRPs may contract with the MDMA chosen by the customer (or the customer’s LSE) for submitting SQMD to the DRP’s SC.

   i. Access to Electronic Data by non-Utility DRP

       For non-Utility DRPs electing to use PG&E’s Electronic Data Interchange (EDI) functionality when PG&E serves as an MDMA, PG&E shall provide these DRPs with access to the appropriate electronic platform (e.g. the MDMA server) to facilitate energy data exchanges required for DRP’s DR service(s). The requirements for such access are found in Section E.4 below.

   jj. Net Benefits Test

       All DRPs bidding Bundled Service customer’s load into the CAISO’s wholesale market using the CAISO’s DR Service(s) must submit bids that are at or above the Net Benefits Test described in Section 30.6.3 of CAISO’s Fifth Replacement FERC Electric Tariff.

(Continued)
ELECTRIC RULE NO. 24
DIRECT PARTICIPATION DEMAND RESPONSE

C. GENERAL TERMS (CONT'D.)

3. Transfer of Cost Obligations Between DRPs and Customers

Nothing in this Rule is intended to prevent DRPs and customers from agreeing to reallocate between them any costs for DRP’s DR Services that are subject to this Rule to be paid by either of them.

4. LSE Is Not Liable for DRP DR Services

To the extent the customer takes service from a DRP, the customer’s LSE has no obligations to the customer with respect to the services provided by the DRP.

5. DRP is Not Liable for LSE’s Services

The DRP has no obligations to the customer with respect to the services provided by that LSE. The customer must look to its LSE, not the DRP, to carry out the responsibilities associated with those services.

6. Split Loads Not Allowed

Customers requesting DRP DR Service may not partition the electric loads of a service agreement or service account among different DRPs at any one time. The entire load and load reduction for a service agreement or service account can be registered in the CAISO’s Relevant SystemsDRS for only one DRP at any one time.

7. Formal Notification for Residential and Small Commercial Customers

Residential customers are defined as PG&E customers who are eligible for service under one of its residential rate schedules. Small Commercial customers are defined as any non-residential customers with a maximum billing peak demand of less than 20 kilowatt (kW). Non-Utility DRPs intending to enroll Residential and Small Commercial customers in DR Services are required to meet additional CPUC requirements before submitting such customer service agreements for Resource Registration at the CAISO Relevant System. These DRPs must obtain approval from the CPUC’s Energy Division for a Customer Notification Form Letter (Form Letter), in hard copy or electronic form, to be provided to each customer explaining the DRP’s terms and conditions of participating in the DRP’s DR Service. If the customer is enrolled in PG&E’s Peak Day PricingPDP program, the Form Letter shall also provide the estimated disenrollment date from Peak Day PricingPDP and that the customer may lose bill protection, if applicable. The disenrollment date shall be on the customer’s next or future meter read date (see Section C.2.d)
C. GENERAL TERMS (CONT’D.)

7. Formal Notification for Residential and Small Commercial Customers (Cont’d.)

The non-Utility DRP must provide the Form Letter to the customer before placing its service account in a DRP’s Resource Registration in the CAISO Relevant System. The Form Letter shall provide any grace period in which the customer can cancel the DR Service enrollment without any charges or penalties.

8. Master Metered Customers

Master metered customers who provide sub-metered tenant billings may participate in DRP DR Service as only a single master service account. A master-metered customer may not partition the electric loads of a single master meter among several DRPs.

9. Service Fees and Other Charges

PG&E may incur costs in order to facilitate a non-Utility DRP’s participation in CAISO’s DR Services. Any fees to reimburse PG&E for these costs are described in PG&E rate Schedule E-DRP and must be paid on a timely basis to ensure service under this Rule.
D. ACCESS TO CUSTOMER DATA

1. Access to Customer Usage Data – Release of Information to non-Utility DRPs

PG&E will provide confidential customer-specific information and usage data for a Bundled, DA or CCA service customer to parties specified by that customer, subject to PG&E’s Rule 27, and the following provisions:

a. The inquiring party must have customer authorization pursuant to using Form CISR-DRP before a customer’s personally identifiable information can be released. The information, upon such authorization, will be released only to the inquiring party, unless otherwise authorized by the customer, as part of the Form-CISR-DRP process. The inquiring party as the recipient of this data agrees to abide by the applicable Commission customer privacy requirements. When PG&E receives an authorized CISR-DRP, PG&E shall transmit the following data to the non-Utility DRP:

For the purposes of this program, the Form CISR-DRP shall permit the customer to authorize the following:

1. Customer Service Agreement Account information, including service address and rate schedule.

2. Up to 1 year of historical interval data and monthly billed usage, as it is available for that specific Service Agreement.

3. Unique Customer Identifier to track the customer service account Service Agreement in CAISO Relevant Systems. This information will be provided to the customer’s Load Serving Entity (LSE) too if different from PG&E.

4. Customer one-digit meter read cycle letter for purposes of verifying Meter Read Date and date to begin DR Service.

5. Ongoing monthly interval usage data and ongoing monthly billed usage.

6. A maximum of the most recent twelve (12) months of customer billing data or the amount of data recorded for that specific service account. When a CISR-DRP is received, PG&E shall also transmit the following data, defined as Confidential Information in the DRP Service Agreement (Form 79-1160), to the non-Utility DRP:

(61) Confidential end-user information such as customer’s service voltage, the sub-Load Aggregation Point (sub-LAP), and Pricing node (Pnode), Local Capacity Area, and the identity and contact information of the customer’s LSE, MDMA and MSP.

7. PG&E’s demand response program(s) and tariff schedule(s) in which the Service Account Agreement(s) are currently enrolled and the estimated date of when the customer may be eligible to participate in DR Service without

(Continued)
D. ACCESS TO CUSTOMER DATA (CONT’D.)

1. Access to Customer Usage Data – Release of Information to non-Utility DRPs (Cont’d)

   b. When a CISR-DRP is received, PG&E shall also transmit the following data, defined as Confidential Information in the DRP Service Agreement (Form 79-1160), to the non-Utility DRP (Cont’d):

   (72) (Cont’d)

       *direct financial consequence from PG&E. Applicable PG&E demand response tariffs include: PG&E’s Schedule(s) E-RSAC, E-CSAC, E-DBP, E-SLRP, E-OBMC, E-CBP, E-RSMART, and E-BIP and PG&E’s Aggregator Managed Portfolio (AMP). PG&E will also indicate if the account Service Agreement(s) listed above is participating in the Peak Day Pricing (PDP) option of its applicable rate schedule. |

   For the programs listed above, PG&E shall also provide information, as it is available, on the earliest eligible date(s) on which the customer can leave its current program without any contractual or program obligations under the terms and conditions of the tariff that may result in financial or tariff implications such as but not limited to, losing bill protection or incentive payments, return of received incentives, and/or penalties.

   Further, where PG&E has specifically been required to do so, PG&E will indicate if the customer Service Agreement(s) is participating in a PG&E-administered pilot program, known at the time of receipt of the authorized CISR-DRP to potentially cause a conflict with the dual participation rules described in Section C.2.d. An example of such a pilot is PG&E’s Plug-In Electric Vehicle Pilot.

   In accordance with Section C.1.c, PG&E, acting in its role as the UDC, will assess whether a customer Service Agreement submitted by a DRP to the CAISO’s Relevant System is participating in a program, pilot or tariff referenced in this section. Programs constituting program conflicts are subject to change over time.

   (83) Basic meter information including the meter number, the type of meter and the intervals currently being collected by the meter.

   c. Customer information specified in Sections D.1.a.(1-3) will be released to the customer or its authorized agent up to two (2) times per year per service agreement or account at no cost to the requesting party. Thereafter, PG&E may have the right to assess a processing charge as approved by the CPUC. Customer data specified in Section D.1.a.(5) will be released to the customer/authorized agent on an ongoing basis at charges authorized by the CPUC, unless provided through electronic means, as outlined in Metering

   (Continued)
DIRECT PARTICIPATION DEMAND RESPONSE

(b) By submitting—signing a CISR-DRP, which includes the authorized electronic process included in the definition of CISR-DRP in this rule: When a CISR-DRP is received by PG&E, the customer also:

(1) The customer grants the DRP permission to request that PG&E shorten the interval length of its electric meter(s), as made available by PG&E, for the Service Agreement(s) listed above (when PG&E is the Meter Service Provider for the Service Agreement(s)).

(2) The customer acknowledges and authorizes that if its Service Agreement is on Peak Day Pricing (PDP), then the Service Agreement will be scheduled to be automatically unenrolled from PDP when the Service Agreement is approved by both the UDC and LSE for use in the CAISO’s wholesale market by a non-utility DRP. Further, the customer agrees that it will bear any resulting financial consequences, including without limitation, loss of bill protection, incentive payments, and return of incentives.
D. ACCESS TO CUSTOMER DATA (CONT'D.)

1. Access to Customer Usage Data – Release of Information to non-Utility DRPs (Cont’d)

   d. Durations by which the non-Utility DRP may continue to receive access to a customer’s information shall be specified by the customer in the CISR-DRP. The customer may choose from the following options: (1) indefinitely data release until otherwise canceled by the customer or DRP, or (2) a specified time period until otherwise canceled by the customer or DRP release of data until a date certain, (3) authorization for non-Utility DRP to terminate data release upon DRP DR Service cancellation. If the customer makes no election, Utility will assume that customer authorization is for an indefinite period of time per CPUC Resolution E-4599.

   If the authorization comes to PG&E via authorized electronic processes from a non-Utility DRP website, that bypasses Form 79-1152, the customer will be offered one of the following time period options: one year, three years, five years, or indefinite. The option offered to the customer will be preselected within a range selected by the non-Utility DRP as part of its registration process. The customer may accept the a–non-Utility DRP-offered option time period, or the customer may reject the non-Utility DRP-offered time period by not completing the electronic authorization process.

   In the event that the customer, not the non-Utility DRP on the customer’s behalf, revokes access to customer meter data, PG&E shall provide the non-Utility DRP with immediate notice of the revocation.

   Under all Options (3), it is the non-Utility DRP’s responsibility to notify PG&E to terminate the non-Utility DRP’s access to the customer’s data. Upon receipt of the notice of termination from the non-Utility DRP or the revocation of data access authorization from the customer, PG&E will cease to provide the customer’s on-going interval usage data to the non-Utility DRP. However, the non-Utility DRP may continue to receive previously generated data that pertains to the period of time during which customer authorization was valid. This information will assist the non-Utility DRP in settling invoices with the CAISO related to customer Service Agreements during the time that they were active in DR Services.

   e. When PG&E is acting as the MDMA, if daily meter-interval data is available through PG&E’s portals, the daily meter-interval data will not be RQMD. RQMD interval data will be available on a monthly basis. When Open ADE is available to PG&E, the tariff for Open ADE will govern the provision of daily meter data.

2. Access to Direct Access or CCA Service Customer Data when PG&E is the DRP but not the MDMA

(Continued)
ELECTRIC RULE NO. 24
DIRECT PARTICIPATION DEMAND RESPONSE

a. PG&E, in its role as a DRP, will contract with the customer’s MDMA in order to receive the necessary meter data (as described in Section F) for the purposes of managing its own DRP DR Services program, and to assist in its forecasting, bidding, dispatch, and settlement activities.

3. Customer Inquiries Concerning Billing-Related Issues

a. Customer inquiries concerning PG&E’s charges or services should be directed to PG&E.
D. ACCESS TO CUSTOMER DATA (CONT’D.)

3. Customer Inquiries Concerning Billing-Related Issues (Cont’d)
   b. Customer inquiries concerning the non-Utility DRP’s charges or services should be directed to the non-Utility DRP.
   c. Customer inquiries concerning the LSE’s charges or services should be directed to the LSE.

4. Customer Inquiries Related to Emergency Situations and Outages
   a. PG&E will be responsible for responding to all inquiries related to distribution service, emergency system conditions, outages, and safety situations. Customers contacting the DRP with such inquiries should be referred directly to PG&E.
   b. It may be necessary for PG&E to shed or curtail customer load at the request of the CAISO, or as otherwise provided by CPUC authorized tariffs. PG&E shall provide notice to the non-Utility DRP of such curtailments as soon as practical, however PG&E is not responsible to notify the non-Utility DRP’s Scheduling Coordinator. Nothing in this rule shall change the criteria for load-shedding established by the CAISO, the CPUC, or PG&E’s operation procedures.
   c. PG&E shall continue to be responsible for implementing its own CPUC-approved DR programs.

E. DRP DR SERVICE ESTABLISHMENT

DRPs enrolling bundled service customers must satisfy the following regulatory requirements, as they might apply, before the DRP can provide DRP DR Services in PG&E’s service territory.

1. CPUC Registration Requirements
   a. Execute a Demand Response Provider Service Agreement (DRP Service Agreement – Form No 79-1160) with PG&E.
   b. Satisfy PG&E’s credit requirements as specified in Section H.
   c. Register with the CPUC and maintain a valid DRP registration at the CPUC.
E. DRP DR SERVICE ESTABLISHMENT (CONT’D)

1. CPUC Registration Requirements (Cont’d)
   
d. Complete the CPUC DRP Registration Application Form. DRPs enrolling PG&E’s residential and small commercial customers shall also provide the CPUC a performance bond under the name of the CPUC as a security deposit or financial guarantee bond in an amount pursuant to the matrix below and as specified in the CPUC Registration form.

<table>
<thead>
<tr>
<th>Number of Customers</th>
<th>Security Deposit Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – 2,500</td>
<td>$25,000</td>
</tr>
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2. CAISO Requirements

   All DRPs enrolling PG&E Bundled Service customers must:
   
a. Execute the necessary service agreements for registering resources with the CAISO.
   
b. Meet all the CAISO’s requirements for the DRP and maintain their registration at the CAISO as a qualified DRP.

23. Maintenance of DRP Registration at the CPUC

   a. The CPUC will post the list of registered DRPs on its website. The CPUC will enforce all rules for the DRP registration and may suspend or revoke a DRP registration if the CPUC determines that the DRP violated Rule 24 or terms and conditions outlined in the CPUC DRP Registration Form. The CPUC may require that the DRP periodically renew its registration to maintain its status.
   
b. The CPUC will investigate complaints relative to DRP activities and may suspend or revoke a DRP registration if a civil or business court, or the CPUC, finds that the DRP has engaged in activities that warrant such action, after appropriate due process considerations. The CPUC may also allow the DRP to cure any identified deficiencies or inappropriate activities within a reasonable period of time.
E. DRP DR SERVICE ESTABLISHMENT (CONT'D)

23. Maintenance of DRP Registration at the CPUC (Cont’d)
   c. DRPs shall keep the CPUC registration information up to date.

34. EDI Requirements

Until superseded by another data exchange process, such as Open ADE, and to the extent the DRP elects to use Electronic Data Interchange (EDI) or an analogous platform to communicate with PG&E for DRP DR Service implementation, the DRP must satisfy applicable technical requirements, including, without limitation:

a. A DRP must complete all necessary electronic interfaces for the DRP and PG&E to communicate meter reading and usage data.

b. The DRP must have the capability to exchange data with PG&E via the Internet. Alternative arrangements to EDI may be allowed if mutual agreement is made between PG&E and the DRP.

c. The DRP must have the capability to perform EDI transactions, and enter into appropriate agreements related thereto.

45. CAISO Requirements

All DRPs enrolling PG&E Bundled Service customers must:

a. Execute the necessary service agreements for registering resources with the CAISO.

b. Meet all the CAISO’s requirements for the DRP and maintain their registration at the CAISO as a qualified DRP.

F. METERING SERVICES

Metering Services are comprised of three primary functions: Meter Ownership, Meter Services (installation, maintenance, and testing), and MDMA services. Each participating DRP DR Service customer must have an interval meter capable of meeting CAISO DR Service requirements being read remotely by PG&E when acting in its capacity as MDMA.

1. Meter Changes

If a meter change is required to participate in DRP DR Services (i.e. the existing meter is not an appropriate interval meter), and PG&E is the MSP, the customer and DRP have choices for how to proceed:

a. The customer may be scheduled to receive an interval meter as part of PG&E smart meter deployment. In this instance, the customer and DRP can
ELECTRIC RULE NO. 24
DIRECT PARTICIPATION DEMAND RESPONSE

(Continued)

elect to begin DRP DR Services after PG&E completes its deployment of PG&E smart meters and is able to provide the required interval data.

b. If an interval meter with a shorter measurement duration is desired, and such a meter and metering service related back-office capability are readily available from PG&E, PG&E will provide this meter at an additional CPUC-approved fee.
ELECTRIC RULE NO. 24
DIRECT PARTICIPATION DEMAND RESPONSE

F. METERING SERVICES (CONT’D.)

1. Meter Changes (Cont’d.)

b. (Cont’d.)

(1) For Bundled Service and CCA Service accountService Agreements with a maximum demand of 200 kW or greater for at least one month in the past 12 billing months, PG&E will provide and install the metering and communication equipment at no cost to the customer.

(2) For Bundled Service and CCA Service accountService Agreements whose maximum billed demand has not exceeded the level specified in item 1 above, the customer can elect one of the following:

   i. Pay the cost to have PG&E install an appropriate interval meter that is not a SmartMeter interval meter at the customer’s expense pursuant to Electric Rule 2, Special Facilities, or

   ii. If the PG&E SmartMeter requirements meet CAISO DR Services metering standards, wait until a PG&E SmartMeter is installed and remote-read enabled.

c. For Direct Access service accountService Agreements where PG&E is the Meter Data Management Agent (MDMA), no incremental fees under this rule are required. Metering services shall be provided pursuant to Electric Rule 22.

d. For Direct Access service accountService Agreements where PG&E is the MSP but not the MDMA, then the customer will be responsible for any and all costs associated with providing acceptable interval data to the DRP, including costs for any additional metering, communication equipment, and fees assessed by the customer’s Electric Service Provider (ESP).

e. PG&E is not required to install an interval meter and communication equipment or SmartMeter to provide remote read capability if the installation is impractical or not economically feasible.

f. PG&E shall endeavor to complete the meter change request within fifteen (15) days of service agreementService Agreement enrollment with the CAISO in the absence of a meter installation backlog or other circumstances beyond PG&E’s control such as, but not limited to, delays in the installation of a communication line to the meter. PG&E shall provide notice of any current meter service backlog and estimate its next available installation date. However, if the DRP or the customer is willing to pay a fee to expedite the installation of the meter, PG&E will endeavor to accommodate the request. The fee shall be consistent with fees adopted by the CPUC.

(Continued)
G. DISCONTINUATION OF SERVICE BY DRP

1. Service Changes at the Individual Customer Level

The DRP may elect to discontinue providing DRP DR Service to its customers, or the customer may elect to disenroll from the program pursuant to any agreement between the DRP and its customers. Should the customer terminate electric service with PG&E, the customer is responsible for terminating its arrangement with the DRP directly. For customers who change their LSE, the DRP is responsible for effectuating necessary changes in the CAISO’s Relevant Systems.

2. Service Changes at the CAISO Resource Registration Level

A customer enrolled as part of a Resource Registration at the CAISO may have its DRP DR Service discontinued by its DRP due to the following conditions:

a. The CPUC terminates or revokes the DRP’s registration or its ability to participate in CAISO’s DR Services

b. The CPUC issues an order that otherwise prohibits the DRP from entering into a DRP Service Agreement (Form 79-1160);

c. The DRP has materially breached its obligations under the terms and conditions of the DRP Service Agreement;

d. The DRP exercises its contractual right to terminate the DRP Service Agreement;

e. The DRP is no longer authorized by the CAISO to provide DR Services.

f. The CPUC revokes the Utilities’ authority to participate in DR Service(s) activities.

3. Discontinuation of DRP DR Service by the DRP

a. The DRP is responsible for notifying the LSE, PG&E, SC and MDMA, if impacted, when it will discontinue DRP DR Service to the customer.

b. If the DRP elects to discontinue offering DRP DR Services, the DRP shall also notify the CAISO, and the CPUC, and the LSE of its decision to do so and specify the date(s) on which service will be discontinued. The DRP will effect a termination of its Resource Registration with the CAISO;

c. If the DRP is no longer able to provide DRP DR Service because its authorization to do so has been terminated or revoked, the DRP shall notify the impacted parties (LSEs, PG&E, SC, MDMA), the CAISO and the CPUC unless they are already involved in the decision on such revocation or termination.

(Continued)
ELECTRIC RULE NO. 24
DIRECT PARTICIPATION DEMAND RESPONSE

G. DISCONTINUATION OF SERVICE BY DRP (CONT’D.)

3. Discontinuation of DRP DR Service by the DRP (Cont’d.)

d. When a non-Utility DRP disenrolls a customer, the non-Utility DRP must notify the customer and PG&E that it will be revoking the customer’s authorization to transmit its data to the Non-Utility DRP upon such disenrollment date. If the Non-Utility DRP has not revoked the CISR-DRP authorization to receive the customer’s information described in Section D.1 usage data as of the date the DRP DR Service is canceled, the Non-Utility DRP must notify DRP DR Service participants that they should contact PG&E to revoke the authorization for the non-Utility DRP to receive their usage data confidential information as of the date the DRP DR Service is canceled.

e. In the event a non-Utility DRP has been authorized to terminate deliveries of a customer’s metering data streams upon the customer’s disenrollment from its DRP DR Service program, the non-Utility DRP must notify the customer that the DRP is no longer authorized to receive the customer’s Confidential Information pursuant to such termination. The Non-Utility DRP is required to notify PG&E to stop transmission of data, consistent with the customer’s instructions to the DRP.

H. NON-UTILITY DRP CREDIT REQUIREMENTS REQUIRED BY PG&E

1. PG&E may require the non-Utility DRP enrolling Bundled Service customers to establish and maintain its creditworthiness through evaluations, deposits, or other security in the manner described in Section H.2, to the extent the CPUC approves the ability for PG&E to levy charges for services rendered as a result of DR activities. That is, the creditworthiness only applies to charges that are billed by PG&E directly to the non-Utility DRP. The method of determining the amount of credit that a DRP would need to submit in order to initiate services within PG&E’s service territory shall be equal to two times the estimated or actual monthly CPUC-approved fees for DRP DR Service, as described herein and as verified by PG&E. The non-Utility DRP will be obliged to provide the CPUC with a separate performance bond as part of its registration process for Residential and Small Commercial customers.

2. The non-Utility DRP may establish its creditworthiness with PG&E through any one of the following:

a. Credit Evaluation

A non-Utility DRP with a demonstrable current credit rating of Baa2 or higher from Moody’s or BBB or higher from Standard and Poor’s, or Fitch is deemed to be creditworthy unless PG&E determines that a material change in the non-Utility DRP’s creditworthiness has occurred. PG&E requires the non-Utility DRP to complete a credit application including financial information reasonably necessary to establish credit. The creditworthiness evaluation may be conducted by an outside credit analysis agency,
ELECTRIC RULE NO. 24
DIRECT PARTICIPATION DEMAND RESPONSE

(Continued)

determined by PG&E, with final credit approval granted by PG&E. This evaluation will be completed within ten (10) business days. Credit reports will remain strictly confidential between the credit analysis agency and PG&E, except to the extent PG&E is required to disclose to the CPUC or its agents. A credit application processing fee, as approved by the CPUC, may be charged to offset the cost of determining the non-Utility DRP’s creditworthiness.
I. COMPLIANT AND DISPUTE RESOLUTION PROCESSES (CONT’D.)

2. Suspension or Revocation of Non-Utility DRP’s Registration at the CPUC

Pursuant to the Commission’s authority provided by California Public Utilities Code Sections 451, and 701 through 702, the CPUC’s enforcement authority includes; but is not limited to, suspension or revocation of non-Utility DRP registration and imposition of penalties and/or fines after appropriate due process. The CPUC’s Consumer Affairs Branch (CAB) shall process and report to the Commission all informal consumer complaints against non-Utility DRPs on a quarterly basis.

If CAB staff determines, after consultation with Energy Division staff and facilitating mediation between a retail customer complainant and a non-Utility DRP, that a resolution cannot be reached, the complaint may be escalated to the CPUC’s Safety and Enforcement Division (SED). SED may consider taking appropriate enforcement action, including proposing for Commission consideration the suspension and/or revocation of the non-Utility DRP’s registration, and fines and/or penalties against the non-Utility DRP. SED will notify the non-Utility DRP, the CAISO, the relevant LSEs, and the UDC of such pending adverse action. The non-Utility DRP that is the subject of the SED action may respond to such action consistent with the procedures provided in the Commission’s Rules of Practice and Procedure.

This process does not exclude alternative means of investigation of complaints regarding non-Utility DRPs as provided by the CPUC’s Rules of Practice and Procedure. Information regarding formal and informal complaint processes is available through the CPUC’s Public Advisor’s Office or at www.cpuc.ca.gov.

Grounds for potential suspension or revocation of non-Utility DRP’s registration and/or penalties or fines are based on the statutes cited in this section and the Commission Decisions (D.)12-11-025 and 13-12-029. Examples of conduct that may violate these authorities include, but are not limited to:

a. Forgery of Rule 24 forms and other required documents or equivalent electronic process;
b. Use of deceptive or unclear advertisements or terms and conditions in contracts and customer letter;
c. Improper registration for servicing residential and small commercial customers (see DRP Registration Application Form);
d. Failure in notifying customers when servicing residential and small commercial customers (see Section C.7);
e. Failure in notifying PG&E and other impacted entities of a customer discontinuation of DR Services (see Section G.3);
f. Violation of dual participation rules (see Section C.2.d);
g. Non-payment of PG&E fees or credit/performance bond lapse. (see Sections E.1 and H).
I. COMPLIANT AND DISPUTE RESOLUTION PROCESSES (CONT’D.)

2. Suspension or Revocation of Non-Utility DRP’s Registration at the CPUC (Cont’d.)

h. Unauthorized data transfer of customer specific data to others (see Section D.1.d);

i. Invalid DRP Service Agreement (Form 79-1160) with PG&E and the CAISO (see Section E);

j. Failure to fulfill the mutually agreed-upon terms and conditions, e.g., non-payment to the enrolled customers for services rendered (See Customer Notification Form Letter).

k. Provision of faulty or misleading equipment/data to the customer by the DRP to the detriment of the customer.

l. Maintenance of sufficient bond amount.

3. Appeal of a non-Utility DRP Suspension or Revocation at the CPUC

A non-Utility DRP may appeal in writing to the CAB regarding notification of suspension, revocation, or immediate revocation. To appeal the notification, the disqualified entity must first contact the CAB within thirty (30) days to discuss the issue. If the revoked entity has new information to provide the CAB, then it must be provided to CAB within thirty (30) days. If the revoked entity and the CAB cannot resolve the dispute, then the revoked entity can file a complaint using the CPUC’s Formal Complaint process. Information on the formal Complaint process is available through the Public Advisor’s Office at the CPUC or on CPUC’s website: www.cpuc.ca.gov.

J. ACRONYMS

The following acronyms are used within this Rule 24:

(BPM) - Business Practice Manual
(CAB) - CPUC’s Consumer Affairs Branch
(CAISO) - California Independent System Operator
(CCA) - Community Choice Aggregation
(CISR-DRP) - Customer Information Service Request for Demand Response Providers
(CPUC) - California Public Utilities Commission
(DA) - Direct Access

(Continued)
ELECTRIC RULE NO. 24  
DIRECT PARTICIPATION DEMAND RESPONSE

J. ACRONYMS (CONT’D.)

(DASMD) - Direct Access Standards for Metering and Meter Data
(DLAP) - Default Load Aggregation Point
(DR) - Demand Response
(DRP) - Demand Response Provider
(DRS) - Demand Response System
(DRRS) - Demand Response Registration System
(EDI) - Electronic Data Interchange
(ESP) - Electric Service Provider
(FERC) - Federal Energy Regulatory Commission
(LSE) - Load Serving Entity
(MDMA) - Meter Data Management Agent
(MSP) - Meter Service Provider
(Open ADE) - Open Automated Data Exchange
(PDP) - Peak Day Pricing
(RQMD) - Revenue Quality Meter Data
(SA) - Service Agreement
(SC) - Scheduling Coordinator
(S-LAP) - Sub Load Aggregation Point
(SQMD) - Settlement Quality Meter Data
(UDC) - Utility Distribution Company
(VEE) - Validated, Edited, and Estimated

(Continued)
Attachment 3

Full Terms and Conditions for Click-Through
attachment 3 – full terms and conditions for click-through

please read the following terms and conditions carefully.

these terms and conditions below have been approved by the california public utilities commission (cpuc) and are subject to such modifications as the cpuc may direct from time to time in the exercise of its jurisdiction.

by clicking on “submit” you are exercising your right to disclose your personal electricity-related information to up to two third-party demand response providers (drps), pursuant to pg&e’s electric rule 24 (rule 24), so that you may obtain demand response services offered by drp(s). rule 24 can be accessed www.pge.com/tariffs/tm2/pdf/elec_rules_24.pdf.

once you authorize access by the drp(s) to your personal information, you are responsible for ensuring that the drp(s) safeguards this information from further disclosure without your consent. authorization for pg&e to release your information under rule 24 is separate from commitments you may have or may make with the drp(s) for their services.

summary of information authorized to be released

you agree to have pg&e release the following information to your authorized drp(s): (1) customer service agreement and account information (e.g., name, service address, and rate schedule); (2) up to 48 months of historical and ongoing interval meter data and/or monthly usage data; (3) current pg&e demand response programs in which you are known to participate; and (4) certain other data elements as specified in rule 24. the list of data elements may be modified from time to time with approval by the cpuc. rule 24 contains the list of data elements authorized by the commission, and can be viewed at www.pge.com/tariffs/tm2/pdf/elec_rules_24.pdf.

actions you agree to authorize the drp to make on your behalf

you agree to grant the authorized drp(s) permission to request that pg&e shorten the interval length of your electric meter(s), as available by pg&e, when the drp(s) has successfully enrolled your service agreement with the california independent system operator (caiso), if pg&e is the meter service provider. such meter reprogramming may be necessary to enable your drp to participate in the wholesale market.

you grant the authorized drp(s) permission to revoke this authorization on your behalf and a revocation submitted by any one party shall revoke this authorization for all of the other parties to this authorization.

actions you agree to authorize pg&e to make on your behalf

you agree to grant pg&e the right to release your personal electricity related information to the drp(s) even after the authorization has ended, limited to corrections/updates to the data for the time period during which this authorization was valid. in all cases, the authorization for a service agreement will be automatically revoked when the service agreement is closed by the customer.

you agree that if you are on peak day pricing (pdp), then you will automatically be unenrolled from pdp when your service agreement has been successfully setup by the drp in the caiso’s demand response systems. you agree to bear any resulting financial consequences, including without limitation, loss of bill protection, incentive payments, and reimbursements to pg&e of incentives, related to your participation in pdp, other pg&e dr programs, or dr enabling technology.

if you are submitting this authorization on behalf of the customer of record, you declare that you are authorized to execute this authorization electronically on behalf of the customer of record, and that you have authority to financially bind the customer of record.
You understand PG&E reserves the right to verify any Authorization request submitted before releasing information or taking any action on your behalf. You hereby release, hold harmless, and indemnify PG&E from any liability, claims, demands, and causes of action, damages, or expenses resulting from: (1) any release of information to the DRP pursuant to this Authorization; (2) the unauthorized use of this information by the DRP or any third party; and (3) any actions taken by the DRP pursuant to this Authorization.

The start date for the release by PG&E of your personal electricity related information will be upon the completed processing of this Authorization. The end date for the release by PG&E of your personal electricity related information is the earlier of the following: (1) as specified in this Authorization; (2) until you or one of the authorized DRP(s) revoke this Authorization; or (3) until the service agreement is closed by the Customer. You, or your authorized DRP(s), may revoke this Authorization at any time. You agree that a revocation submitted by you or your DRP(s) shall revoke the Authorization for all parties.

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