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**PUBLIC UTILITIES COMMISSION**

505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3298



January 16, 2018

**Advice Letter 5197-E**

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: Revision of Electric Form 79-1014 - Direct Access Customer Relocation  
Declaration in Compliance with D.12-12-026**

Dear Mr. Jacobson:

Advice Letter 5197-E is effective as of January 14, 2018.

Sincerely,

A handwritten signature in cursive script that reads "Edward Randolph".

Edward Randolph  
Director, Energy Division



**Erik Jacobson**  
Director  
Regulatory Relations

Pacific Gas and Electric Company  
77 Beale St., Mail Code B13U  
P.O. Box 770000  
San Francisco, CA 94177

Fax: 415-973-3582

December 15, 2017

**Advice 5197-E**  
(Pacific Gas and Electric Company ID U 39 E)

Public Utilities Commission of the State of California

**Subject: Revision of Electric Form 79-1014 - Direct Access Customer Relocation Declaration in Compliance with Decision (D.) 12-12-026**

Pacific Gas and Electric Company (PG&E) hereby submits for filing revisions to its electric tariffs. The affected tariff sheets are listed on the enclosed Attachment 1.

**Purpose**

This filing revises PG&E's Direct Access Customer Relocation Declaration (electric Form 79-1014) to propose a Direct Access (DA) enrollment process improvement change for customers who are seeking to relocate their DA rights, under certain conditions, to an existing bundled service customer site in compliance with Ordering Paragraph (OP) 8 of Decision (D.) 12-12-026.

**Background**

On December 27, 2012, the California Public Utilities Commission (Commission or CPUC) issued Decision (D.) 12-12-026 which adopted a number of Direct Access enrollment process improvements including revisions to the Direct Access Customer Relocation Declaration (PG&E Form 79-1014) to incorporate a new Special Condition, Option 4.D, to allow a customer terminating Direct Access service at their "Current Location" to relocate all of part of its business operations to a "New Location" where the customer has been receiving bundled service.

Under the current Direct Access tariffs, a customer with wholly-owned subsidiaries with different Federal Taxpayer Identification Numbers (FTIN) are defined to be, and treated as, separate entities for the purpose of relocating their eligibility for direct access service. In the normal course of business, a customer may wish to close a location under one subsidiary and seek to relocate that load to another existing location under the aegis of a different subsidiary. It is possible for this to be accomplished under the existing DA rules through the closure of the DA account under the first subsidiary's FTIN at the current location, establishing a new account at the current location under the second subsidiary's FTIN, then followed by the sequential use of the Customer Assignment Notification (PG&E Form 79-1116) to assign DA eligibility from one

subsidiary to another, a Direct Access Customer Relocation Declaration to relocate the DA eligibility from the current location to a new location, and finally a Direct Access Service Request to initiate DA service at the new location. This process is burdensome for the customer, the customer's Electric Service Provider, and PG&E as it requires close coordination between all of three parties to meet the required timelines.

Following discussions held with the Direct Access Customer Coalition, Southern California Edison and San Diego Gas and Electric, we are proposing revisions to the Direct Access Customer Relocation Declaration form to allow a customer with wholly-owned subsidiaries to request that these entities be treated as a single entity for the purpose of transferring eligibility for DA service and electric power service from its Current Location to a New Location in the normal course of business under Option 4.D. of the Direct Access Customer Relocation Declaration.

PG&E is submitting the proposed revisions to the Direct Access Customer Relocation Declaration form in compliance with Ordering Paragraph 8 of D.12-12-026 which states "Any additional Direct Access enrollment process improvements sought by parties shall be requested by filings Tier 2 advice letter."

### **Tariff Revisions**

PG&E proposes the following revisions to the Direct Access Customer Relocation Declaration (PG&E Form 79-1014):

1. Revised Condition A.1 to reflect that the Electric Service Provider (ESP) Declaration may be executed by an authorized **representative** of the ESP [bold emphasis added].
2. Revised Condition B.4 to refer to the former listing of customer service accounts as "Attachment 1."
3. Added Condition B.12 to incorporate the new Customer Affidavit to the Direct Access Relocation Declaration form.
4. Added the new Customer Affidavit, Attachment 2, for use by customers with seeking to relocate DA eligibility between wholly-owned subsidiaries under Option 4.d.
5. Added a line to each signature block throughout the form for a "printed" name.
6. Revised Attachment 1, to clarify that, unless requested by PG&E, a copy of the original signature document is not required if the request is submitted by email or fax.

A redline version of the revisions to the Direct Access Customer Relocation Declaration form is included as Attachment 2.

### **Protests**

Anyone wishing to protest this filing may do so by letter sent via U.S. mail, facsimile or E-mail, no later than January 4, 2018, 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, 4<sup>th</sup> 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**

PG&E requests that this Tier 2 advice filing become effective on regular notice, January 14, 2018, which is 30 calendar days after the date of filing.

**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 R.07-05-025. 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

Attachments

cc: Service List R.07-05-025

# CALIFORNIA PUBLIC UTILITIES COMMISSION

## ADVICE LETTER FILING SUMMARY ENERGY UTILITY

MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No. **Pacific Gas and Electric Company (ID U39 E)**

Utility type:

ELC       GAS  
 PLC       HEAT       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

(Date Filed/ Received Stamp by CPUC)

Advice Letter (AL) #: **5197-E**

**Tier: 2**

Subject of AL: **Revision of Electric Form 79-1014 - Direct Access Customer Relocation Declaration in Compliance with Decision (D.) 12-12-026**

Keywords (choose from CPUC listing): Compliance, Form

AL filing type:  Monthly  Quarterly  Annual  One-Time  Other \_\_\_\_\_

If AL filed in compliance with a Commission order, indicate relevant Decision/Resolution #: D.12-12-026

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

Confidential information will be made available to those who have executed a nondisclosure agreement: N/A

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: **January 14, 2018**

No. of tariff sheets: **3**

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: **Electric Sample Form No. 79-1014, Direct Access Customer Relocation Declaration**

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., 4<sup>th</sup> 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**

<b>Cal P.U.C. Sheet No.</b>	<b>Title of Sheet</b>	<b>Cancelling Cal P.U.C. Sheet No.</b>
41574-E	Electric Sample Form No. 79-1014 Direct Access Customer Relocation Declaration Sheet 1	32411-E**
41575-E	ELECTRIC TABLE OF CONTENTS Sheet 1	41150-E*
41576-E	ELECTRIC TABLE OF CONTENTS Sheet 25	36604-E



**Electric Sample Form No. 79-1014**  
Direct Access Customer Relocation Declaration

Sheet 1

**Please Refer to Attached  
Sample Form**



# DIRECT ACCESS CUSTOMER RELOCATION DECLARATION

## A. Electric Service Provider (ESP) Declaration

I, \_\_\_\_\_, state as follows:

1. I am an authorized representative of \_\_\_\_\_ (Name of ESP) ("ESP") authorized to make this declaration. I have personal knowledge of the matters set forth herein and if called upon as a witness could and would testify competently thereto.
2. Pursuant to a valid agreement (Agreement) by and between \_\_\_\_\_ (Name of ESP) and \_\_\_\_\_ (Name of Customer) ("Customer"), ESP provides electric power service to Customer at the Current Location, as specified below.
3. As stated herein, Customer requests to transfer its direct access (DA) service provided by PG&E and electric power service provided by ESP at the Current Location, to the New Location, as specified in this document. This relocation is requested in the normal course of business.
4. Under the provisions of the Agreement, the Customer has the right to receive electric power service from ESP for electric service loads located at the New Location.
5. All conditions of the Agreement necessary for a transfer of electric service from Current Location to New Location have been satisfied, including any necessary approvals by ESP.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct. Executed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ at

\_\_\_\_\_, \_\_\_\_\_  
(City) (State)

Signature: \_\_\_\_\_  
Authorized Representative of ESP

: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



# DIRECT ACCESS CUSTOMER RELOCATION DECLARATION

## B. Customer Declaration

I, \_\_\_\_\_, state as follows:

1. I am an authorized representative of \_\_\_\_\_ (“Customer”) and I am authorized to make this declaration.
2. I have personal knowledge of the matters set forth herein and if called upon as a witness could and would testify competently thereto.
3. Customer has entered into an agreement for direct access service (Agreement) with the ESP as identified above.
4. Customer requests to transfer its DA service provided by PG&E and its electric power service provided by ESP from Current Location to New Location, as noted on Attachment 1. This relocation is requested in the normal course of business.

Please check one:

- A. “Current Location” means one existing customer Premises<sup>1</sup> where the electric load of one service account (which may consist of one or more electric meters) is currently being served under DA. “New Location” means the same or different Premises from the Current Location which has been newly acquired or constructed by customer, at which the customer intends to relocate all or part of its business and operations from the Current Location. The New Location may only consist of one service account.
- B. “Current Location” means one existing customer Premises where the electric load of one or more service accounts are currently being served under DA. “New Location” means the same or different Premises from the Current Location which has been newly acquired or constructed by customer, at which the customer intends to relocate all or part of its business and operations from the Current Location. The New Location may consist of one or more service accounts at a single Premises.
- C. “Current Location” means one or more existing customer Premises where the electric load of one or more service accounts is currently being served under DA. “New Location” means a different Premises from the Current Location to which the customer intends to relocate all or part of its business and operations from the Current Location. The New Location may consist of one or more service accounts at a single or multiple Premises. Customer warrants that the total DA load of all active accounts at New Location after the relocation has been completed is limited to loads the same as, or substantially the same as, the loads represented by the Current Location. .

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<sup>1</sup> Premises is defined in PG&E’s electric Rule 1 Automated Document, Preliminary Statement, Part A.



DIRECT ACCESS CUSTOMER RELOCATION DECLARATION

D. "Current Location" means one or more existing customer Premises where the electric load of one or more service accounts is currently being served under DA. "New Location" means a different Premises than the Current Location to which the customer intends to relocate all or part of its business and operations from the Current Location. The New Location may only consist of one service account at which the customer has been receiving bundled service. The New Location shall not be eligible for DA service until all electric service accounts billing under the same customer of record at the Current Location have been terminated. Customer must submit this request to PG&E no later than ninety (90) days from the date all the service accounts at the Current Location have been terminated.

- 5. Customer understands that a New Location cannot include bundled service accounts that have been in the customer's name for more than ninety (90) days. This section is not applicable if Section 4.D. above is selected.
6. Customer warrants its total DA load as a result of the relocation does not exceed the load limitations provided in the Agreement.
7. Customer agrees to maintain, and make available to the California Public Utilities Commission (CPUC) upon request, all records associated with its electricity service and consumption at Current Location and New Location, including, but not limited to, the applicable meter and account numbers, and the associated direct access load.
8. Customer agrees to (Check One):

Close its service account(s) at Current Location on [Expected date].

Return its service account(s) at Current Location(s) to bundled service on [Expected date].

Split the load on the service account(s) at Current Location as follows. (this section is only applicable if section 4.C above is selected). Identify service account(s) by PG&E Service Agreement Number in the space below.:

Three horizontal lines for identifying service account(s) by PG&E Service Agreement Number.

- 9. Customer understands that this declaration must be submitted within sixty (60) days of closing its service account at the Current Location or moving part of its business or operations from the Current Location to a New Location.
10. Customer understands that a DASR must be submitted within sixty (60) days of either a) this relocation declaration's acceptance by PG&E or b) establishment of electric service at the New Location, whichever is later, for this relocation to be valid.



## DIRECT ACCESS CUSTOMER RELOCATION DECLARATION

11. Customer understands that continuous direct access status pursuant to Ordering Paragraph 4 of CPUC Decision 02-11;022 (exemption from paying the DWR components of the DA Cost Responsibility Surcharge) will transfer to a relocation account only if each service account at the Current Location(s) being combined for the relocation service account qualifies as continuous direct access. If the customer elects to combine a number of service accounts that do not qualify as continuous direct access, then the relocation service account will not qualify as continuous direct access.
  
12. Customer understands that the Current Location and New Location must be under the same ownership or must be wholly-owned subsidiaries of the same parent corporation. Under Option 4.D, above, a Customer may request to assign DA eligibility and transfer its DA service between wholly-owned subsidiaries with different Federal Taxpayer Identification Numbers, as specified below, by completing the Affidavit in Attachment 2 and submitting it with this request.

I declare under penalty of perjury under the laws of the State Of California that the foregoing is true and correct. Executed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ at \_\_\_\_\_, \_\_\_\_\_ [City, State]

Signature: \_\_\_\_\_  
Authorized Representative of New Customer

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



DIRECT ACCESS CUSTOMER RELOCATION DECLARATION — ATTACHMENT 1 —

Name On Account: \_\_\_\_\_

Current Location Information (Service Account(s) listed by PG&E Service Agreement Number):

Service Agreement Number: \_\_\_\_\_
Service Address: \_\_\_\_\_
City, State, ZIP: \_\_\_\_\_
Meter Number: \_\_\_\_\_

Service Agreement Number: \_\_\_\_\_
Service Address: \_\_\_\_\_
City, State, ZIP: \_\_\_\_\_
Meter Number: \_\_\_\_\_

Service Agreement Number: \_\_\_\_\_
Service Address: \_\_\_\_\_
City, State, ZIP: \_\_\_\_\_
Meter Number: \_\_\_\_\_

New Location Information (Service Account(s) listed by PG&E Service Agreement Number):

(The direct access service will occur at the New Location and, if only part of its business or operations is relocated, the Current Location may also continue to receive direct access service)

Service Agreement Number: \_\_\_\_\_
Service Address: \_\_\_\_\_
City, State, ZIP: \_\_\_\_\_
Meter Number: \_\_\_\_\_

Service Agreement Number: \_\_\_\_\_
Service Address: \_\_\_\_\_
City, State, ZIP: \_\_\_\_\_
Meter Number: \_\_\_\_\_

Service Agreement Number: \_\_\_\_\_
Service Address: \_\_\_\_\_
City, State, ZIP: \_\_\_\_\_
Meter Number: \_\_\_\_\_

(For more service accounts, please list the additional service accounts on a separate sheet and attach it to this form.)

Upon receipt by PG&E of the customer relocation declaration, PG&E shall review the information and notify ESP within five (5) business days either that (a) the relocation declaration has been accepted; or (b) PG&E has reasonable cause not to process the customer relocation declaration. Upon receiving notification of the relocation declaration's acceptance under subsection (a) above, ESP must submit a DASR to PG&E within sixty (60) days of either a) this relocation declaration's acceptance by PG&E or b) establishment of electric service at the New Location, whichever is later. Upon receiving denial notification from PG&E under subsection (b) above, PG&E and ESP shall confer as soon as possible to determine what additional information is required in order for the relocation declaration to be accepted. This document may be executed in counterparts and submitted by email or fax, however PG&E reserves the right to request the original signature documents if needed.



DIRECT ACCESS CUSTOMER RELOCATION DECLARATION - ATTACHMENT 2 -

CUSTOMER AFFIDAVIT

(To be completed each time a Direct Access Customer Relocation Declaration includes New Location(s) of wholly-owned subsidiaries of Customer with different Federal Taxpayer Identification Numbers under Option 4.D.)

I, \_\_\_\_\_, state as follows:

- 1. I am an authorized representative of \_\_\_\_\_ ("Customer") and I am authorized to make this declaration.
2. I have personal knowledge of the matters set forth herein and if called upon as a witness could and would testify competently thereto.
3. Customer attests that the following entities are wholly-owned subsidiaries of Customer and have different Federal Taxpayer Identification Numbers (FTIN), but should be treated as a single entity for the purpose of transferring eligibility for Direct Access (DA) service and electric power service from its Current Location to a New Location in the normal course of business.

Table with 3 columns: Legal Name Of Business, FTIN, Acquisition Date. Rows 1-5.

(Please list the additional wholly-owned subsidiaries on a separate sheet and attach it to this form.)

- 4. Customer understands that PG&E reserves the right to review the information being provided and may request additional documentation of ownership from Customer. If PG&E determines that the listed entities are not all wholly-owned by Customer at the time of the relocation request, PG&E may not process the customer relocation declaration or may rescind the assignment of DA eligibility and the associated relocation(s).

I declare under penalty of perjury under the laws of the State Of California that the foregoing is true and correct. Executed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ at \_\_\_\_\_ [City, State]

Signature: \_\_\_\_\_ Authorized Representative of New Customer

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_





**ELECTRIC TABLE OF CONTENTS**

Sheet 25

FORM	TITLE OF SHEET	CAL P.U.C. SHEET NO.
<b>Sample Forms</b>		
<b>Rule 22 Direct Access Services and Electric Rule 22.1 Direct Access Switching Exemption Rules</b>		
79-948	Electric Service Provider (ESP) Service Agreement .....	32812-E
79-1011	Notice to Return to PG&E Bundled Service .....	35086-E
79-1014	Direct Access Customer Relocation Declaration.....	<b>41574-E</b>
79-1116	Customer Assignment Notification .....	34617-E
79-1117	Six Month Notice to Transfer to Direct Access Service .....	36602-E
<b>Sample Forms</b>		
<b>Rule 24 Direct Participation Demand Response</b>		
79-1152	Customer Information Service Request For DRP (CISR-DRP).....	35859*-E
79-1160	Demand Response Provider (DRP) Service Agreement.....	35843-E
<b>Sample Forms</b>		
<b>Rule 27.1 Access to Energy Usage and Usage-Related Data While Protecting Privacy of Personal Data</b>		
79-1166	Non-Disclosure Agreement.....	35299-E
79-1167	Local Governments Terms of Service Acceptance Agreement.....	34317-E

(T)

(Continued)

Advice 5197-E  
December 15, 2017

**Attachment 2**  
**Redline Tariffs**



# DIRECT ACCESS CUSTOMER RELOCATION DECLARATION

## A. Electric Service Provider (ESP) Declaration

I, \_\_\_\_\_, state as follows:

1. I am an ~~officer~~ authorized representative of \_\_\_\_\_ (Name of ESP) ("ESP") authorized to make this declaration. I have personal knowledge of the matters set forth herein and if called upon as a witness could and would testify competently thereto.
2. Pursuant to a valid agreement (Agreement) by and between \_\_\_\_\_ (Name of ESP) and \_\_\_\_\_ (Name of Customer) ("Customer"), ESP provides electric power service to Customer at the Current Location, as specified below.
3. As stated herein, Customer requests to transfer its direct access (DA) service provided by PG&E and electric power service provided by ESP at the Current Location, to the New Location, as specified in this document. This relocation is requested in the normal course of business.
4. Under the provisions of the Agreement, the Customer has the right to receive electric power service from ESP for electric service loads located at the New Location.
5. All conditions of the Agreement necessary for a transfer of electric service from Current Location to New Location have been satisfied, including any necessary approvals by ESP.

I declare under penalty of perjury under the laws of the State ~~Of~~ of California that the foregoing is true and correct. Executed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ at

\_\_\_\_\_, \_\_\_\_\_  
(City) (State)

Signature: \_\_\_\_\_  
Authorized Representative of ESP

: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



# DIRECT ACCESS CUSTOMER RELOCATION DECLARATION

## B. Customer Declaration

I, \_\_\_\_\_, state as follows:

1. I am an authorized representative of \_\_\_\_\_ (“Customer”) and I am authorized to make this declaration.
2. I have personal knowledge of the matters set forth herein and if called upon as a witness could and would testify competently thereto.
3. Customer has entered into an agreement for direct access service (Agreement) with the ESP as identified above.
4. Customer requests to transfer its DA service provided by PG&E and its electric power service provided by ESP from Current Location to New Location, as noted on Attachment 1~~the attached form~~. This relocation is requested in the normal course of business.

Please check one:

- A. “Current Location” means one existing customer Premises<sup>1</sup> where the electric load of one service account (which may consist of one or more electric meters) is currently being served under DA. “New Location” means the same or different Premises from the Current Location which has been newly acquired or constructed by customer, at which the customer intends to relocate all or part of its business and operations from the Current Location. The New Location may only consist of one service account.
- B. “Current Location” means one existing customer Premises where the electric load of one or more service accounts are currently being served under DA. “New Location” means the same or different Premises from the Current Location which has been newly acquired or constructed by customer, at which the customer intends to relocate all or part of its business and operations from the Current Location. The New Location may consist of one or more service accounts at a single Premises.
- C. “Current Location” means one or more existing customer Premises where the electric load of one or more service accounts is currently being served under DA. “New Location” means a different Premises from the Current Location to which the customer intends to relocate all or part of its business and operations from the Current Location. The New Location may consist of one or more service accounts at a single or multiple Premises. Customer warrants that the total DA load of all active accounts at New Location after the relocation has been completed is limited to loads the same as, or substantially the same as, the loads represented by the Current Location. .

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<sup>1</sup> Premises is defined in PG&E’s electric Rule 1 Automated Document, Preliminary Statement, Part A.



DIRECT ACCESS CUSTOMER RELOCATION DECLARATION

D. "Current Location" means one or more existing customer Premises where the electric load of one or more service accounts is currently being served under DA. "New Location" means a different Premises than the Current Location to which the customer intends to relocate all or part of its business and operations from the Current Location. The New Location may only consist of one service account at which the customer has been receiving bundled service. The New Location shall not be eligible for DA service until all electric service accounts billing under the same customer of record at the Current Location have been terminated. Customer must submit this request to PG&E no later than ninety (90) days from the date all the service accounts at the Current Location have been terminated.

- 5. Customer understands that a New Location cannot include bundled service accounts that have been in the customer's name for more than ninety (90) days. This section is not applicable if Section 4.D. above is selected.
6. Customer warrants its total DA load as a result of the relocation does not exceed the load limitations provided in the Agreement.
7. Customer agrees to maintain, and make available to the California Public Utilities Commission (CPUC) upon request, all records associated with its electricity service and consumption at Current Location and New Location, including, but not limited to, the applicable meter and account numbers, and the associated direct access load.

8. Customer agrees to (Check One):

Close its service account(s) at Current Location on [Expected date].

Return its service account(s) at Current Location(s) to bundled service on [Expected date].

Split the load on the service account(s) at Current Location as follows. (this section is only applicable if section 4.C above is selected). Identify service account(s) by PG&E Service Agreement Number in the space below.:

Three horizontal lines for identifying service account(s) by PG&E Service Agreement Number.

- 9. Customer understands that this declaration must be submitted within sixty (60) days of closing its service account at the Current Location or moving part of its business or operations from the Current Location to a New Location.
10. Customer understands that a DASR must be submitted within sixty (60) days of either a) this relocation declaration's acceptance by PG&E or b) establishment of electric service at the New Location, whichever is later, for this relocation to be valid.



# DIRECT ACCESS CUSTOMER RELOCATION DECLARATION

11. Customer understands that continuous direct access status pursuant to Ordering Paragraph 4 of CPUC Decision 02-11;022 (exemption from paying the DWR components of the DA Cost Responsibility Surcharge) will transfer to a relocation account only if each service account at the Current Location(s) being combined for the relocation service account qualifies as continuous direct access. If the customer elects to combine a number of service accounts that do not qualify as continuous direct access, then the relocation service account will not qualify as continuous direct access.

12. Customer understands that the Current Location and New Location must be under the same ownership or must be wholly-owned subsidiaries of the same parent corporation. Under Option 4.D, above, a Customer may request to assign DA eligibility and transfer its DA service between wholly-owned subsidiaries with different Federal Taxpayer Identification Numbers, as specified below, by completing the Affidavit in Attachment 2 and submitting it with this request.

I declare under penalty of perjury under the laws of the State Of California that the foregoing is true and correct. Executed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ at \_\_\_\_\_, \_\_\_\_\_ [City, State]

Signature: \_\_\_\_\_  
Authorized Representative of New Customer

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



DIRECT ACCESS CUSTOMER RELOCATION DECLARATION — ATTACHMENT 1 —

Name On Account: \_\_\_\_\_

Current Location Information (Service Account(s) listed by PG&E Service Agreement Number):

Service Agreement Number: \_\_\_\_\_
Service Address: \_\_\_\_\_
City, State, ZIP: \_\_\_\_\_
Meter Number: \_\_\_\_\_

Service Agreement Number: \_\_\_\_\_
Service Address: \_\_\_\_\_
City, State, ZIP: \_\_\_\_\_
Meter Number: \_\_\_\_\_

Service Agreement Number: \_\_\_\_\_
Service Address: \_\_\_\_\_
City, State, ZIP: \_\_\_\_\_
Meter Number: \_\_\_\_\_

New Location Information (Service Account(s) listed by PG&E Service Agreement Number):

(The direct access service will occur at the New Location and, if only part of its business or operations is relocated, the Current Location may also continue to receive direct access service)

Service Agreement Number: \_\_\_\_\_
Service Address: \_\_\_\_\_
City, State, ZIP: \_\_\_\_\_
Meter Number: \_\_\_\_\_

Service Agreement Number: \_\_\_\_\_
Service Address: \_\_\_\_\_
City, State, ZIP: \_\_\_\_\_
Meter Number: \_\_\_\_\_

Service Agreement Number: \_\_\_\_\_
Service Address: \_\_\_\_\_
City, State, ZIP: \_\_\_\_\_
Meter Number: \_\_\_\_\_

(For more service accounts, please list the additional service accounts on a separate sheet and attach it to this form.)

Upon receipt by PG&E of the customer relocation declaration, PG&E shall review the information and notify ESP within five (5) business days either that (a) the relocation declaration has been accepted; or (b) PG&E has reasonable cause not to process the customer relocation declaration. Upon receiving notification of the relocation declaration's acceptance under subsection (a) above, ESP must submit a DASR to PG&E within sixty (60) days of either a) this relocation declaration's acceptance by PG&E or b) establishment of electric service at the New Location, whichever is later. Upon receiving denial notification from PG&E under subsection (b) above, PG&E and ESP shall confer as soon as possible to determine what additional information is required in order for the relocation declaration to be accepted. This document may be executed in counterparts and submitted by email or fax, however PG&E reserves the right to request the original signature



*Pacific Gas and  
Electric Company®*

**DIRECT ACCESS CUSTOMER  
RELOCATION DECLARATION  
— ATTACHMENT 1 —**

~~documents if needed provided the originals are delivered to PG&E within ten (10) business days thereafter.~~



DIRECT ACCESS CUSTOMER RELOCATION DECLARATION - ATTACHMENT 2 -

CUSTOMER AFFIDAVIT

(To be completed each time a Direct Access Customer Relocation Declaration includes New Location(s) of wholly-owned subsidiaries of Customer with different Federal Taxpayer Identification Numbers under Option 4.D.)

I, \_\_\_\_\_, state as follows:

- 1. I am an authorized representative of \_\_\_\_\_ ("Customer") and I am authorized to make this declaration.
2. I have personal knowledge of the matters set forth herein and if called upon as a witness could and would testify competently thereto.
3. Customer attests that the following entities are wholly-owned subsidiaries of Customer and have different Federal Taxpayer Identification Numbers (FTIN), but should be treated as a single entity for the purpose of transferring eligibility for Direct Access (DA) service and electric power service from its Current Location to a New Location in the normal course of business.

Table with 3 columns: Legal Name Of Business, FTIN, Acquisition Date. Rows 1-5.

(Please list the additional wholly-owned subsidiaries on a separate sheet and attach it to this form.)

- 4. Customer understands that PG&E reserves the right to review the information being provided and may request additional documentation of ownership from Customer. If PG&E determines that the listed entities are not all wholly-owned by Customer at the time of the relocation request, PG&E may not process the customer relocation declaration or may rescind the assignment of DA eligibility and the associated relocation(s).

I declare under penalty of perjury under the laws of the State Of California that the foregoing is true and correct. Executed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ at \_\_\_\_\_ [City, State]

Signature: \_\_\_\_\_ Authorized Representative of New Customer

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

**PG&E Gas and Electric  
Advice Filing List  
General Order 96-B, Section IV**

AT&T	Don Pickett & Associates, Inc.	Office of Ratepayer Advocates
Albion Power Company	Douglass & Liddell	OnGrid Solar
Alcantar & Kahl LLP	Downey & Brand	Pacific Gas and Electric Company
Anderson & Poole	Ellison Schneider & Harris LLP	Praxair
Atlas ReFuel	Energy Management Service	Regulatory & Cogeneration Service, Inc.
BART	Evaluation + Strategy for Social Innovation	SCD Energy Solutions
Barkovich & Yap, Inc.	G. A. Krause & Assoc.	SCE
Braun Blaising Smith Wynne P.C.	GenOn Energy, Inc.	SDG&E and SoCalGas
CalCom Solar	Goodin, MacBride, Squeri, Schlotz & Ritchie	SPURR
California Cotton Ginners & Growers Assn	Green Charge Networks	San Francisco Water Power and Sewer
California Energy Commission	Green Power Institute	Seattle City Light
California Public Utilities Commission	Hanna & Morton	Sempra Utilities
California State Association of Counties	ICF	Southern California Edison Company
Calpine	International Power Technology	Southern California Gas Company
Casner, Steve	Intestate Gas Services, Inc.	Spark Energy
Cenergy Power	Kelly Group	Sun Light & Power
Center for Biological Diversity	Ken Bohn Consulting	Sunshine Design
City of Palo Alto	Leviton Manufacturing Co., Inc.	Tecogen, Inc.
City of San Jose	Linde	TerraVerde Renewable Partners
Clean Power Research	Los Angeles County Integrated Waste Management Task Force	Tiger Natural Gas, Inc.
Coast Economic Consulting	Los Angeles Dept of Water & Power	TransCanada
Commercial Energy	MRW & Associates	Troutman Sanders LLP
County of Tehama - Department of Public Works	Manatt Phelps Phillips	Utility Cost Management
Crossborder Energy	Marin Energy Authority	Utility Power Solutions
Crown Road Energy, LLC	McKenna Long & Aldridge LLP	Utility Specialists
Davis Wright Tremaine LLP	McKenzie & Associates	Verizon
Day Carter Murphy	Modesto Irrigation District	Water and Energy Consulting
Defense Energy Support Center	Morgan Stanley	Wellhead Electric Company
Dept of General Services	NLine Energy, Inc.	Western Manufactured Housing Communities Association (WMA)
Division of Ratepayer Advocates	NRG Solar	Yep Energy