

PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3298



February 20, 2019

Advice Letter 3936-G-A and 5229-E-A

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 to Sample Form 79-1186, "Share My Data Customer Authorization or Revocation of Authorization Form".

Dear Mr. Jacobson:

Advice Letter 3936-G-A and 5229-E-A are effective as of February 14, 2019.

Sincerely,

A handwritten signature in dark ink that reads "Edward Randolph".

Edward Randolph
Director, Energy Division

October 18, 2018

Advice 3936-G-A/5229-E-A

(Pacific Gas and Electric Company ID U 39M)

Public Utilities Commission of the State of California

Subject: Supplemental: Revision to Electric Rule 25 and Sample Form 79-1186, “Customer Information Service Request For Share My Data (CISR-SMD)”

Purpose

On February 14, 2018, Pacific Gas and Electric Company (PG&E) submitted a Tier 1 Advice 3936-G/5229-E to update the Gas and Electric Sample Form 79-1186, “Share My Data Customer Authorization or Revocation of Authorization Form” to reflect changes necessary to be consistent with Ordering Paragraph (OP) 14 of Resolution E-4868. These proposed revisions included increasing the duration of historical data to be provided and expanding a customer’s ability to disclose information pertaining the customer’s enrollment in a PG&E Demand Response (DR) program.

At the request of the Energy Division (ED), PG&E respectfully submits this supplemental advice letter, which requests approval for proposed changes to Electric Rule 25 and the customer information release form, Gas and Electric Sample Form 79-1186 – Customer Information Service Request For Share My Data (CISR-SMD)¹. This supplemental advice letter supersedes original Advice 3936-G/5449-E in its entirety. Upon approval, PG&E will align these revisions with the on-line customer authorization for Share My Data via the My Energy web portal.

Even though revisions to Electric Rule 25 and Form 79-1186 were not specifically ordered by Resolution E-4868, PG&E believes this supplemental advice letter is a Tier 1 submittal because the changes are limited to the following: 1) those that are necessary to adapt to modifications made to PG&E’s Share My Data (SMD)² platform order by Resolution E-

¹ As part of this supplemental AL, PG&E is requesting permission to change the name of Form 79-1186 from “Share My Data Customer Authorization or Revocation of Authorization Form” to “Customer Information Service Request For Share My Data.” This allows the name of Form 79-1186 is consistent with the name of the existing Form 11-1152, “Customer Information Service Request For Demand Response Provider” which is used for Electric Rule 24.

² PG&E’s Share My Data on-line platform provides secure access to customer data for all customer classes. Customers can access the information for personal use or authorize a third party to access their energy related data for their specified authorized Service Agreements(s).

4868, 2) those identified through an April 26, 2018 data request by the CPUC's Energy Division, 3) those needed to correct an inadvertent error to update to the expanded data set, 4) those needed to reflected Form 79-1186, and 5) those needed to reflect PG&E's current nomenclature.

Background

On September 29, 2016, PG&E submitted and received California Public Utilities Commission (CPUC or Commission) approval for Advice 3764-G/4924-E that eliminated Form 79-1147 and created a new Share My Data Customer Authorization or Revocation of Authorization Form (Form 79-1186) that aligned with modifications to PG&E's SMD platform, which expanded the data set that a customer could authorize for release. However, Advice 3764-G/4924-E inadvertently did not include necessary revisions to Electric Rule 25 to include the expanded data set and to replace Form 79-1147 with Form 79-1186. The CPUC approved Advice 3764-G/4924-E on February 24, 2017 with an effective date of October 29, 2016.

Consistent with OP 14 of Resolution E-4868, PG&E has expanded its SMD platform to give customers the ability to disclose additional types of data to third parties, including providing additional data elements pertaining to the customer's enrollment in a PG&E Demand Response (DR) program.

Further, through an April 26, 2018 data request, the CPUC's Energy Division identified several additional changes to the Gas and Electric Form 79-1186. As part of its preparation for this supplemental advice letter, PG&E identified several changes that were also required to Electric Rule 25.

Correspondingly, PG&E is requesting to revise Electric Rule 25 and the Gas and Electric Form 79-1186 - Share My Data Customer Authorization or Revocation of Authorization Form. The changes are summarized in the section below.

PG&E requests approval of changes to Electric Rule 25 and the Gas and Electric Sample Form 79-1186 - Share My Data Customer Authorization or Revocation of Authorization Form, which are attached to this Supplemental Advice Letter as Attachment 1.

Tariff Revisions

Gas and Electric Form 79-1147

PG&E is requesting to remove Gas and Electric Form 79-1147 since Gas and Electric Form 79-1186 are aligned with modifications to PG&E's SMD platform.

Electric Rule 25

PG&E is requesting authorization to make the following revisions to Electric Rule 25.

1. Added language so Rule 25 covers a larger data set than just electric interval data. Rule 25 now covers “energy related data” that includes gas and/or electric for the elements shown in the CISR-SMD.
2. Edited most references from “data”, “interval usage data”, etc. to “Customer Data”.
3. Added language to clarify that Rule 25 applies to “PG&E customers with open service agreements for electric service as a Bundled, Community Choice Aggregation (CCA), and Direct Access (DA) customer, and gas service as a Core End-Use and Noncore End-Use customer”.
4. Corrected reference to form from “Authorization or Revocation of Authorization to Receive Customer Interval Usage Information” (79-1147) to “Customer Information Service Request For Share My Data” (79-1186). Advice 3764-G/4924-E, filed 9/29/2016, intended to replace Form 79-1147 with 79-1186. However, Electric Rule 25 was not updated accordingly.
5. Updated “Customer Data Access” to “Share My Data” and “CDA” to “SMD” to match the current name of the platform.
6. Updated “service account” to “service agreement” to better match the nomenclature used throughout PG&E.
7. Deleted portions of Section III. B. SERVICE OFFERING, Description of Data because they were specific to interval data.

Gas and Electric Form 79-1186

PG&E is requesting authorization to make the following revisions to Gas and Electric Form 79-1186 - Share My Data Customer Authorization or Revocation of Authorization Form.

1. Change name of form from “Share My Data Customer Authorization or Revocation of Authorization Form (CISR-CDA)” to “Customer Information Service Request For Share My Data” (CISR-SMD)”.
2. Added the privacy language at the beginning of the form and near the signature blocks. This language closely matches the language from PG&E’s current “Customer Information Service Request For Demand Response Provider” (CISR-DRP), Form 79-1152.
3. Changed term “Cancel” to “Revoke” so it matches the term used in Electric Rule 25.
4. Added language to allow a Customer’s Agent to sign and submit the form.
5. Added language referencing “Customer Information Service Request For Demand Response Provider” (CISR-DRP), Form 79-1152.

6. Added language stating that this form can be used to release electric-related information for Bundled, Community Choice Aggregation (CCA), Direct Access (DA) customers, and gas-related information for Core End-Use and Noncore End-Use customers.
7. Added language stating that the CPUC has jurisdiction to modify the form.
8. Changed “electric” to “gas and/or electric” where appropriate.
9. Replaced all reference of “Company” with “Third Party” to be consistent with all other references to vendors using the Share My Data platform.
10. Added “Program Enrollment Information (Includes current and ongoing PG&E Demand Response program name and status.)”.
11. Changed Authorization Period from “24 months” to “up to 48 months” of historical data.
12. Added: “In all cases, the Authorization for a Service Agreement will be automatically revoked when the Service Agreement is closed by the Customer.
13. Added “I hereby indicate my consent to execute and submit this Authorization electronically.”

For your convenience, redline versions of Electric Rule 25 and the Sample Electric Form 79-1186 is provided in Attachments 2. The Sample Gas Forms version of this form is exactly the same as the Sample Electric Forms version so only one copy of the redlines of the Sample Forms was included.

The submittal would not increase any current rate or charge, cause the withdrawal of service, or conflict with any rate schedule or rule.

Protests

Pursuant to CPUC General Order 96-B, Section 7.5.1, PG&E hereby requests the protest period be waived.

Effective Date

PG&E requests that this Tier 2 advice submittal become effective concurrent with original Advice Letter 3936-G/5229-E, which is February 14, 2018.

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 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 submittals can also be accessed electronically at: <http://www.pge.com/tariffs/>.

_____/S/

Erik Jacobson
Director, Regulatory Relations

Attachments

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



ADVICE LETTER 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 M)

Utility type:

☒ ELC ☒ GAS ☐ WATER
☐ PLC ☐ HEAT

Contact Person: Annie Ho

Phone #: (415) 973-8794

E-mail: PGETariffs@pge.com

E-mail Disposition Notice to: AMHP@pge.com

EXPLANATION OF UTILITY TYPE

ELC = Electric GAS = Gas WATER = Water
PLC = Pipeline HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #: 3936-G-A/5229-E-A

Tier Designation: 1

Subject of AL: Supplemental: Revision to Electric Rule 25 and Sample Form 79 1186, "Customer Information Service Request For Share My Data (CISR-SMD)"

Keywords (choose from CPUC listing): Compliance, Form

AL Type: ☐ Monthly ☐ Quarterly ☐ Annual ☒ One-Time ☐ Other:

If AL submitted 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:

Confidential treatment requested? ☐ Yes ☒ No

If yes, specification of confidential information:

Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information:

Resolution required? ☐ Yes ☒ No

Requested effective date: 2/14/18

No. of tariff sheets: 12

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 Rule 25, Gas Sample Form 79-1186, Electric Sample Form 79-1186

Service affected and changes proposed¹: N/A

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

¹Discuss in AL if more space is needed.

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

CPUC, Energy Division
Attention: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102
Email: EDTariffUnit@cpuc.ca.gov

Name: Erik Jacobson, c/o Megan Lawson
Title: Director, Regulatory Relations
Utility Name: Pacific Gas and Electric Company
Address: 77 Beale Street, Mail Code B13U
City: San Francisco, CA 94177
State: California Zip: 94177
Telephone (xxx) xxx-xxxx: (415)973-2093
Facsimile (xxx) xxx-xxxx: (415)973-3582
Email: PGETariffs@pge.com

Name:
Title:
Utility Name:
Address:
City:
State: District of Columbia Zip:
Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email:

Clear Form

Cal P.U.C. Sheet No.	Title of Sheet	Cancelling Cal P.U.C. Sheet No.
34579-G**	Gas Sample Form No. 79-1186 Customer Information Service Request For Share My Data (CISR-SMD) Sheet 1	32958-G
34580-G**	GAS TABLE OF CONTENTS Sheet 1	34569-G
34581-G**	GAS TABLE OF CONTENTS Sheet 12	34457-G**



**Pacific Gas and
Electric Company®**

U 39

San Francisco, California

Revised
Cancelling Original

Cal. P.U.C. Sheet No. 34579-G**
Cal. P.U.C. Sheet No. 32958-G

Gas Sample Form No. 79-1186
Customer Information Service
Request For Share My Data (CISR-SMD)

Sheet 1

(T)
(T)

**Please Refer to Attached
Sample Form**

Advice 3936-G-A
Decision

Issued by
Robert S. Kenney
Vice President, Regulatory Affairs

Submitted October 18, 2018
Effective February 14, 2018
Resolution _____

CUSTOMER INFORMATION SERVICE REQUEST FOR SHARE MY DATA (CISR-SMD)

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

This form allows you to voluntarily create a new Authorization to grant a Third Party of your choice access to your PG&E personal, energy usage, energy billing and other program data about you via PG&E's Share My Data (SMD) platform or to modify or revoke an existing Authorization you currently have on the Share My Data platform. This form should be completed by the main Customer Account Holder (name on the PG&E bill).

Pacific Gas and Electric Company's (PG&E's) Gas and Electric Rules 27 and its corresponding privacy policies, which can be found at www.pge.com/about/company/privacy/customer, do not allow for the disclosure of customers' personal information, such as your name, address, phone number, or electric account and billing information, to third parties for purposes other than providing utility services to you or as otherwise required by law, unless you expressly authorize us to do so. This form allows you to exercise your right to disclose personal and energy-related information about you to a Third Party under PG&E's Electric Rule 25 which can be found at www.pge.com/tariffs/tm2/pdf/ELEC_RULES_25.pdf. This form may be used to authorize the release of electric-related information for Bundled, Community Choice Aggregation (CCA), Direct Access (DA) customers, and gas-related information for Core End-Use and Noncore End-Use customers. Once you authorize access by a Third Party to personal and energy-related information about you, you are responsible for and agree that you are solely responsible for ensuring that the Third Party safeguards this information from further disclosure without your consent.

If you want to provide data to a Demand Response Provider (DRP), please use "Customer Information Service Request For Demand Response Provider" (CISR-DRP), Form 79-1152.

This agreement at all times shall be subject to such modifications 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.

STEP 1: AUTHORIZATION DETAILS

- **Please select the action you wish to take:**

- ☐ **CREATE** A NEW AUTHORIZATION – Please Complete [SECTION 1](#)
- ☐ **MODIFY** AN EXISTING AUTHORIZATION – Please Complete [SECTION 2](#)
- ☐ **REVOKE** AN EXISTING AUTHORIZATION – Please Complete [SECTION 3](#)

- **Your Contact Information:**

First Name: _____ Last Name: _____

Mailing Address: _____

Email Address (Optional): _____

(The email address you provide here will be used for all transactional emails relating to this Authorization.)

CUSTOMER INFORMATION SERVICE REQUEST FOR SHARE MY DATA (CISR-SMD)

[SECTION 1: CREATE A NEW AUTHORIZATION]

- **Third Party:**

Please provide the name of the Third Party you authorize to access your data via the Share My Data platform. You may authorize only those third parties who have registered with PG&E to use the Share My Data platform. This form will not be processed if you list a Third Party who has not registered to use the Share My Data platform.

Name of Third Party: _____

(PLEASE NOTE: PG&E has not conducted vendor security reviews on the Share My Data registered Third Parties. Please be sure to read Terms and Conditions offered by the Third Party prior to authorizing the Third Party to access your data.)

- **Data Elements:**

Please select the data elements you wish to authorize (you may select more than one data element):

- ☐ **Basic Information** (Includes name and service address)
- ☐ **Billing Information** (Includes up to 48 months historical, current, and ongoing billing records, billing and meter read dates, rate schedule, and voltage class.)
- ☐ **Account Information** (Includes account number(s), service agreement number(s), and service start date.)
- ☐ **Usage Information** (Includes up to 48 months of historical, current, and ongoing electric and/or gas usage data used for bill calculations, interval usage, and interval time-of-use indicators.)
- ☐ **PG&E Program Enrollment Information** (Includes current and ongoing PG&E Demand Response program name and status, as well as the name and status of other PG&E programs in which you are enrolled.)

- **Authorization Period:**

The Third Party will automatically have access to up to 48 months of historical data from the date the Authorization is created.

Please select the period of time you wish to authorize the Third Party, listed above, to have ongoing access to the data elements selected above:

☐ Ongoing Access Until _____ or until I revoke this Authorization.
[Date]

OR

☐ Indefinitely until I revoke this Authorization.

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

- **Service Agreement IDs to be Authorized:**

Please list the Account Number(s) and Service Agreement ID(s) you, as the Customer Account Holder, are authorizing the specified Third Party to access via the Share My Data platform:

Account Number	Service Agreement ID

CUSTOMER INFORMATION SERVICE REQUEST FOR SHARE MY DATA (CISR-SMD)

(For more than three Service Agreement IDs please attach a separate file)

[SECTION 2: MODIFY AN EXISTING AUTHORIZATION]

- **Subscription ID:**

Please provide the Subscription ID associated to the Authorization you wish to modify. Your Subscription ID can be found in the confirmation email sent to you when the Authorization was initially created. If you cannot find your Subscription ID, please contact PG&E Customer Service at (800) 743-5000 for assistance.

Subscription ID: _____

- **Authorization Period:**

[☐] Ongoing Access Until _____ or until I revoke this Authorization.
[Date]

OR

[☐] Indefinitely until I revoke this Authorization.

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

- **Service Agreement IDs to be added and/or removed from Authorization by the Customer Account Holder**

If you would like to add or remove Service Agreement IDs from this Authorization, please specify them below.

Account Number	Service Agreement ID	Add	Remove
		☐	☐
		☐	☐
		☐	☐

(For more than three Service Agreement IDs please attach a separate file)

[SECTION 3: REVOKE AN EXISTING AUTHORIZATION]

- **Subscription ID:**

Please provide the Subscription ID associated to the Authorization you wish to revoke. Your Subscription ID can be found in the confirmation email sent to you when the Authorization was initially created. If you cannot find your Subscription ID, please contact PG&E Customer Service at (800) 743-5000 for assistance.

Subscription ID: _____

CUSTOMER INFORMATION SERVICE REQUEST FOR SHARE MY DATA (CISR-SMD)

STEP 2: AGREE TO SHARE MY DATA TERMS AND CONDITIONS

Important information: Please read carefully. This is a legally binding agreement.

- **Create a New Authorization or Modify an Existing Authorization:**

I, (First and Last Name of Customer of Record), _____, authorize the designated Third Party to access the Customer of Record Account Holder's personal energy data in accordance with these terms and conditions for the designated Service Agreement(s) as indicated in Section 1 for new Authorizations or Section 2 for modifying an existing Authorization. I understand PG&E reserves the right to verify any authorization request submitted before releasing information on my behalf.

I declare that I am authorized to execute this Authorization manually or electronically on behalf of the Customer of Record Account Holder, and that I have authority to bind the Customer of Record Account Holder. 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 Third Party pursuant to this Authorization; (2) the unauthorized use of this information by the Third Party or any other third party; and (3) any actions taken by the Third Party 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 Revocation check box selected. I hereby indicate my consent to execute and submit this Authorization electronically.

Signature of Customer

Date

- **Revoke an Existing Authorization:**

I, (First and Last Name of Customer of Record), _____, revoke the Authorization of the designated Third Party to access personal data about me from the designated Service Agreement(s).

I declare that I am authorized to execute this Revocation manually or electronically on behalf of the Customer of Record Account Holder, and that I have authority to bind the Customer of Record Account Holder. 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 Third Party pursuant to this Revocation; and (3) any conduct by the Third Party in connection with this Revocation. I hereby indicate my consent to execute and submit this Revocation electronically.

Signature of Customer

Date

STEP 3: SUBMIT FORM VIA EMAIL OR MAIL

Forms can be emailed to:
sharemydata@pge.com

Forms can be mailed to:
Pacific Gas and Electric Company
Share My Data
245 Market Street, N3E
San Francisco, CA 94105



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Preliminary Statements, Rules	34369-G	
Rules, Maps, Contracts and Deviations.....	33776-G	
Sample Forms	34229,32986,32987,32886, 34581** ,32888-G	(T)

(Continued)

Advice 3936-G-A
Decision

Issued by
Robert S. Kenney
Vice President, Regulatory Affairs

Submitted
Effective
Resolution

October 18, 2018



GAS TABLE OF CONTENTS

Sheet 12

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79-1090	G-ESISP Service Agreement	34431-G
79-1091	G-ESISP Service Relocation Agreement	34432-G
	Sample Forms Miscellaneous	
62-0562	Gas & Electric Facilities Transfer Agreement - Declaration	30755-G
62-0579	Design / Construction Change Order Request	29981-G
62-4501	Abolving Service Agreement	29989-G
62-4527	Agreement to Perform Tariff Schedule Related Work	34425*-G
62-4778	Cancellation of Contract	31700-G
79-861	Electronic Data Interchange (EDI) - Trading Partner Agreement	30761-G
79-936	Deed of Conveyance	34446-G
79-937	Assignment Agreement	34447-G
79-1031	Community Choice Aggregator Non-Disclosure Agreement	30437*-G
79-1039	Rate Schedule Selection Customer Agreement	34428-G
79-1040	Non-Disclosure and Use of Information Agreement	30765-G
79-1041	Notice of Bill Guarantee Termination	30033-G
79-1042	APS/Auto Pay Customer Application	23185-G
79-1043	Irrevocable Standby Letter of Credit	30034-G
79-1095	Authorization to Receive Customer Information or Act Upon a Customer's Behalf	34433*-G
79-1096	Authorization to Receive Customer Information or Act Upon a Customer's Behalf (Spanish)	34434-G
79-1097	Request Change of Mailing Address to a Third Party Change of Address	34435-G
79-1099	Property Manager Authorization to Receive Owner Information or Act on an Owner's Behalf	30590-G
79-1104	Billing Calculation Service Agreement	30768-G
79-1118	General Off-Bill and On-Bill Financing Loan Agreement	30318-G
79-1126	Off-Bill and On-Bill Financing Loan Agreement for Self-Installed Projects	33368-G
79-1128	Affidavit in Support of Customer Claim as Qualifying as a Small Business Customer Under Government Code Section 14837	30769-G
79-1139	Notice of Payment Default	30043-G
79-1143	California State Government Customers On-Bill Financing Loan Agreement	30320-G
79-1156	Authorization To Add Loan Charges To Utility Bill (Residential)	32226-G
79-1157	Authorization To Add Loan Charges To Utility Bill (Non-Residential)	32227-G
79-1173	Energy Efficiency Financing Pilot Programs Authorization or Revocation of Authorization to Release Customer Information	34439-G
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(Continued)

Cal P.U.C. Sheet No.	Title of Sheet	Cancelling Cal P.U.C. Sheet No.
43239-E**	Electric Sample Form No. 79-1186 Customer Information Service Request For Share My Data CISR-SMD Sheet 1	37468-E
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Electric Sample Form No. 79-1186
Customer Information Service
Request For Share My Data CISR-SMD

Sheet 1

(T)
(T)

**Please Refer to Attached
Sample Form**

CUSTOMER INFORMATION SERVICE REQUEST FOR SHARE MY DATA (CISR-SMD)

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

This form allows you to voluntarily create a new Authorization to grant a Third Party of your choice access to your PG&E personal, energy usage, energy billing and other program data about you via PG&E's Share My Data (SMD) platform or to modify or revoke an existing Authorization you currently have on the Share My Data platform. This form should be completed by the main Customer Account Holder (name on the PG&E bill).

Pacific Gas and Electric Company's (PG&E's) Gas and Electric Rules 27 and its corresponding privacy policies, which can be found at www.pge.com/about/company/privacy/customer, do not allow for the disclosure of customers' personal information, such as your name, address, phone number, or electric account and billing information, to third parties for purposes other than providing utility services to you or as otherwise required by law, unless you expressly authorize us to do so. This form allows you to exercise your right to disclose personal and energy-related information about you to a Third Party under PG&E's Electric Rule 25 which can be found at www.pge.com/tariffs/tm2/pdf/ELEC_RULES_25.pdf. This form may be used to authorize the release of electric-related information for Bundled, Community Choice Aggregation (CCA), Direct Access (DA) customers, and gas-related information for Core End-Use and Noncore End-Use customers. Once you authorize access by a Third Party to personal and energy-related information about you, you are responsible for and agree that you are solely responsible for ensuring that the Third Party safeguards this information from further disclosure without your consent.

If you want to provide data to a Demand Response Provider (DRP), please use "Customer Information Service Request For Demand Response Provider" (CISR-DRP), Form 79-1152.

This agreement at all times shall be subject to such modifications 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.

STEP 1: AUTHORIZATION DETAILS

- ***Please select the action you wish to take:***

- ☐ **CREATE** A NEW AUTHORIZATION – Please Complete [SECTION 1](#)
- ☐ **MODIFY** AN EXISTING AUTHORIZATION – Please Complete [SECTION 2](#)
- ☐ **REVOKE** AN EXISTING AUTHORIZATION – Please Complete [SECTION 3](#)

- ***Your Contact Information:***

First Name: _____ Last Name: _____

Mailing Address: _____

Email Address (Optional): _____

(The email address you provide here will be used for all transactional emails relating to this Authorization.)

CUSTOMER INFORMATION SERVICE REQUEST FOR SHARE MY DATA (CISR-SMD)

[SECTION 1: CREATE A NEW AUTHORIZATION]

- **Third Party:**

Please provide the name of the Third Party you authorize to access your data via the Share My Data platform. You may authorize only those third parties who have registered with PG&E to use the Share My Data platform. This form will not be processed if you list a Third Party who has not registered to use the Share My Data platform.

Name of Third Party: _____

(PLEASE NOTE: PG&E has not conducted vendor security reviews on the Share My Data registered Third Parties. Please be sure to read Terms and Conditions offered by the Third Party prior to authorizing the Third Party to access your data.)

- **Data Elements:**

Please select the data elements you wish to authorize (you may select more than one data element):

- ☐ **Basic Information** (Includes name and service address)
- ☐ **Billing Information** (Includes up to 48 months historical, current, and ongoing billing records, billing and meter read dates, rate schedule, and voltage class.)
- ☐ **Account Information** (Includes account number(s), service agreement number(s), and service start date.)
- ☐ **Usage Information** (Includes up to 48 months of historical, current, and ongoing electric and/or gas usage data used for bill calculations, interval usage, and interval time-of-use indicators.)
- ☐ **PG&E Program Enrollment Information** (Includes current and ongoing PG&E Demand Response program name and status, as well as the name and status of other PG&E programs in which you are enrolled.)

- **Authorization Period:**

The Third Party will automatically have access to up to 48 months of historical data from the date the Authorization is created.

Please select the period of time you wish to authorize the Third Party, listed above, to have ongoing access to the data elements selected above:

☐ Ongoing Access Until _____ or until I revoke this Authorization.
[Date]

OR

☐ Indefinitely until I revoke this Authorization.

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

- **Service Agreement IDs to be Authorized:**

Please list the Account Number(s) and Service Agreement ID(s) you, as the Customer Account Holder, are authorizing the specified Third Party to access via the Share My Data platform:

Account Number	Service Agreement ID

CUSTOMER INFORMATION SERVICE REQUEST FOR SHARE MY DATA (CISR-SMD)

(For more than three Service Agreement IDs please attach a separate file)

[SECTION 2: MODIFY AN EXISTING AUTHORIZATION]

- Subscription ID:**

Please provide the Subscription ID associated to the Authorization you wish to modify. Your Subscription ID can be found in the confirmation email sent to you when the Authorization was initially created. If you cannot find your Subscription ID, please contact PG&E Customer Service at (800) 743-5000 for assistance.

Subscription ID: _____

- Authorization Period:**

[] Ongoing Access Until _____ or until I revoke this Authorization.
[Date]

OR

[] Indefinitely until I revoke this Authorization.

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

- Service Agreement IDs to be added and/or removed from Authorization by the Customer Account Holder**

If you would like to add or remove Service Agreement IDs from this Authorization, please specify them below.

Account Number	Service Agreement ID	Add	Remove
		☐	☐
		☐	☐
		☐	☐

(For more than three Service Agreement IDs please attach a separate file)

[SECTION 3: REVOKE AN EXISTING AUTHORIZATION]

- Subscription ID:**

Please provide the Subscription ID associated to the Authorization you wish to revoke. Your Subscription ID can be found in the confirmation email sent to you when the Authorization was initially created. If you cannot find your Subscription ID, please contact PG&E Customer Service at (800) 743-5000 for assistance.

Subscription ID: _____

CUSTOMER INFORMATION SERVICE REQUEST FOR SHARE MY DATA (CISR-SMD)

STEP 2: AGREE TO SHARE MY DATA TERMS AND CONDITIONS

Important information: Please read carefully. This is a legally binding agreement.

- **Create a New Authorization or Modify an Existing Authorization:**

I, (First and Last Name of Customer of Record), _____, authorize the designated Third Party to access the Customer of Record Account Holder's personal energy data in accordance with these terms and conditions for the designated Service Agreement(s) as indicated in Section 1 for new Authorizations or Section 2 for modifying an existing Authorization. I understand PG&E reserves the right to verify any authorization request submitted before releasing information on my behalf.

I declare that I am authorized to execute this Authorization manually or electronically on behalf of the Customer of Record Account Holder, and that I have authority to bind the Customer of Record Account Holder. 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 Third Party pursuant to this Authorization; (2) the unauthorized use of this information by the Third Party or any other third party; and (3) any actions taken by the Third Party 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 Revocation check box selected. I hereby indicate my consent to execute and submit this Authorization electronically.

Signature of Customer

Date

- **Revoke an Existing Authorization:**

I, (First and Last Name of Customer of Record), _____, revoke the Authorization of the designated Third Party to access personal data about me from the designated Service Agreement(s).

I declare that I am authorized to execute this Revocation manually or electronically on behalf of the Customer of Record Account Holder, and that I have authority to bind the Customer of Record Account Holder. 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 Third Party pursuant to this Revocation; and (3) any conduct by the Third Party in connection with this Revocation. I hereby indicate my consent to execute and submit this Revocation electronically.

Signature of Customer

Date

STEP 3: SUBMIT FORM VIA EMAIL OR MAIL

Forms can be emailed to:
sharemydata@pge.com

Forms can be mailed to:
Pacific Gas and Electric Company
Share My Data
245 Market Street, N3E
San Francisco, CA 94105



ELECTRIC RULE NO. 25
RELEASE OF CUSTOMER DATA TO THIRD PARTIES

Sheet 1

I. APPLICABILITY

The following rules apply to PG&E's automated, ongoing provisioning of energy related data,¹ (T)
henceforth referred to as "Customer Data," to customer-authorized third-parties using an
electronic platform known as the Share My Data (SMD) ². The Customer Data available (T)
through this platform is specifically identified in PG&E's Form titled "Customer Information
Service Request For Share My Data" (CISR-SMD) (Form 79-1186). This tariff rule governs
PG&E and the following parties:

1. PG&E customers with open service agreements for electric service as a Bundled, (T)
Community Choice Aggregation (CCA), and Direct Access (DA) customer, and gas (T)
service as a Core End-Use and Noncore End-Use customer; and (T)
2. Third parties authorized by PG&E customers in a customer information release form
(as designated on Form 79-1186) to receive Customer Data provided that the third (T)
parties comply with PG&E's Electric Rule 27 and are eligible pursuant to Section III
below. A copy of Rule 27 may be found at PG&E.com.

II. CUSTOMER AUTHORIZATION/REVOCAION

- A. **Customer Authorization:** Upon receipt of a completed, executed CISR-SMD and third (T)
party adherence to this Rule, PG&E shall make Customer Data available to eligible
customer-authorized third parties within one to five days.
- B. **Customer-Initiated Revocation of Authorization:** Customers may revoke a third
party's authorization to receive Customer Data at any time. Upon receiving the
revocation request, PG&E shall cease transmission of the Customer Data and shall notify (T)
the third party via electronic notification provided by the Third Party within one business
day of the customer's revocation of authorization.
- C. **Other Means of Revocation of Authorization:** Authorization for a third party to receive
Customer Data may also be revoked automatically by the Commission pursuant to
Section V below, or if a third party otherwise becomes ineligible for failure to meet the
other requirements of Section V below.

¹ Additional data types may be available through this platform in the future.

² The Share My Data (SMD) platform was formally named Customer Data Access (CDA) (N)
platform. (N)

(Continued)



ELECTRIC RULE NO. 25
RELEASE OF CUSTOMER DATA TO THIRD PARTIES

Sheet 2

III. SERVICE OFFERING

- A. **Availability of Data:** Customer-authorized third parties must retrieve the Customer Data for a given day five days of it being made available by the data custodian after which time that Customer Data may be removed. PG&E reserves the right to charge fees for re-transmission of Customer Data that third parties failed to retrieve in a timely manner. (T)
- B. **Description of Data:** At the customer's election, authorized third parties meeting the eligibility criteria in Section IV below shall electronically receive Customer Data in a data format consistent with national standards codified by and maintained at the North American Energy Standards Board (NAESB) known as the NAESB Energy Service Provider Interface (ESPI) Standard. PG&E shall update the data format available through the SMD platform to the extent the NAESB ESPI standards are modified from time to time. (T)
- C. **Data Updates:** PG&E will transmit Customer Data once per day after it becomes available. Customer Data transmitted at the end of each day is the most current information at that time and includes any data updates throughout the day. Customer Data that is updated will be provided to the third party subject to availability and consistent with PG&E's requirements under Rules 17, 17.1, or 17.2 when the update is done as a result of a bill adjustment. Any updates of previously transmitted customer data that occurred in the previous 24 hours will be provided along with the usually provided previous day's Customer Data. The "Reading Quality" flag as provided in the NAESB Energy Service Provider Interface (ESPI) Standard will be employed to indicate the quality of meter data provided through the SMD platform.³ A Reading Quality flag will also be used to indicate when this data becomes "revenue quality."⁴ PG&E bears no obligation to transmit Customer Data once a customer's authorization of the third party's right to receive the data has expired or is otherwise terminated, as referenced in Section IV, below. (T)
- D. **Cost:** PG&E shall make Customer Data available through the SMD platform free of charge to customer-authorized third parties provided that the Customer Data is retrieved timely under Section III.A. above. Nothing in this Rule is intended to modify, directly or indirectly, service or data fees established in other applicable tariff rules or schedules. (T)

- ³ North American Energy Standards Board (NAESB) Energy Service Provider Interface (ESPI) Standard pgs. 25 and 28 (T)
- ⁴ "Revenue quality" meter data is defined as usage data that has passed validation, estimating and editing processes in accordance with the Direct Access Standards for Metering and Meter Data (DASMMMD) as described in Electric Rule 22 and is acceptable for billing purposes. A more detailed explanation of quality of meter read data can be found at PG&E's website. (T)

(Continued)



ELECTRIC RULE NO. 25
RELEASE OF CUSTOMER DATA TO THIRD PARTIES

Sheet 3

IV. THIRD-PARTY ELIGIBILITY REQUIREMENTS

Third Parties are subject to the following conditions in order to obtain and maintain access to Customer Data.

1. **Provide and Update Contact Information:** Third parties must input basic contact information at PG&E's SMD Third Party Registration Web Page, including company/entity's name, federal tax identification number, mailing address, and the names, telephone numbers, mailing addresses, and email addresses for any key business and technical contacts at the company/entity. Third parties are solely responsible for making timely updates to that information, as may be required from time to time. (T)
2. **Technical Eligibility:** Third parties must demonstrate connectivity aptitude through the machine-to-machine verification of the third parties' technical feasibility to receive Customer Data securely from PG&E, to be described in more detail at PG&E's SMD Third Party Registration Web Page. PG&E shall work in good faith to resolve technical issues that may arise with third parties seeking technical eligibility. Such work will be limited to connectivity to the SMD platform and PG&E will put forth a reasonable effort to resolve technical issues regarding such connectivity. PG&E will not provide technical consulting to resolve any connectivity issues on the side of the third party. Technical eligibility criteria may change, from time to time, consistent with the NAESB ESPI Standard. (T)
3. **Acknowledge Receipt of Applicable Tariff:** Upon determining that a third party is technically eligible to receive Customer Data as provided in Section IV.2, above, the third party must acknowledge receipt of and has read and understands the terms and conditions of PG&E's Rule 27 and this Rule. (T)
4. **Transparency:** Third parties shall continue to provide customers with clear notice regarding their accessing, collection, storage, use, and disclosure of Customer Data.
5. **Identifier:** Third party shall provide PG&E with a Federal Tax ID number which can be used to track its registration in SMD across the state utilities. (T)

Currently authorized third party agents can be found at PG&E's website.

(Continued)



ELECTRIC RULE NO. 25
RELEASE OF CUSTOMER DATA TO THIRD PARTIES

Sheet 4

V. THIRD PARTY INELIGIBILITY BY ORDER OF THE COMMISSION

- A. **Commission's List of Prohibited Third Parties:** Pursuant to D.13-09-025, the Commission may create and maintain a list of third parties whom the Commission has determined are not eligible to receive Customer Data, even when authorized by the customer, under the SMD platform. The list shall be posted on the Commission's website at www.cpuc.ca.gov. Should a third party be included on this list, PG&E will deem the list to be an order by the Commission declaring the party ineligible to participate on the CDA platform unless and until either (a) the party's name is lifted from the Commission's list of entities prohibited from receiving Customer Data; or (b) the Commission's order has been stayed or enjoined by the appropriate court or agency. The Commission will also provide direct notification to the PG&E regarding any changes to the list. PG&E is not responsible for creating maintaining or continuously monitoring the Commission's list. (T)
- B. **PG&E's Actions With Respect To Commission List:** Customers will have access to a "potential violation" form on PG&E's website which they can electronically submit to PG&E if they suspect third party mishandling of data or non-compliance with this Rule or Rule 27. Customers may also call PG&E Call Center Line to report these suspicious activities. After reviewing case, and in the event that PG&E reasonably suspects that a third party has violated state law or the Commissions' privacy rules, it shall serve the third party and the Commission's Energy Division with a notice of the suspected tariff violation along with any information regarding possible wrongdoing. PG&E shall seek to resolve the suspected tariff violations with the third party during a 21-day resolution period, during which time PG&E will continue transmission of Customer Data unless otherwise requested by the customer. At its discretion, the Energy Division staff may facilitate resolution of the issues between PG&E and the third party, and may grant an additional 21-day period for resolving the issue. If the matter is not resolved during the period set for resolution, PG&E shall file a Tier 2 advice letter seeking to move the third party to the list of entities ineligible to receive Customer Data via the SMD platform. PG&E shall provide notice of this filing to all customers who have selected that third party to receive their Customer Data. Until Commission action resolves the matter, PG&E will continue to transmit data, unless otherwise requested by the customer. (T)
- C. **Commission Authority and Discretion:** The Commission has authority to reduce or eliminate the 21-day resolution period referenced in the immediately preceding sub-section. The Commission also has the authority to address the advice letter referenced in Section V.B above in an expedited manner, the authority to investigate the issue on its own motion, the authority to address a complaint filed at the Commission by the customer concerning the rules and obligations under this tariff or Rule 27, and the authority to determine the appropriate remedy, if necessary, for any tariff violation. (T)
- D. **Customer Authorization:** Successful and valid "registration" with PG&E, pursuant to Sections II.A through V.C above, are necessary but not sufficient conditions before a third party can receive Customer Data under this Rule. Valid and current customer authorization pursuant to Section II is required for Customer Data release under this tariff. (T)

(Continued)



ELECTRIC RULE NO. 25
RELEASE OF CUSTOMER DATA TO THIRD PARTIES

Sheet 5

VI. LIMITATIONS OF LIABILITY

- A. PG&E shall not be deemed to have transmitted Customer Data recklessly provided that it follows the requirements of D.13-09-025 as incorporated in this Rule and Rule 27.
- B. The limitation of liability included in Section 9.f. of Rule 27 is incorporated herein as follows: "PG&E shall not be liable for any claims, demands, causes of actions, damages, or expenses arising from or resulting from any release of Covered Information or other confidential customer information pursuant to a customer's written authorization, legal process or the Commission's order; the unauthorized use of Covered Information or other confidential customer information by a third party receiving such information from PG&E pursuant to a customer's written authorization, legal process or the Commission's order; or any actions taken by a customer-authorized third party. After PG&E makes a secure and authorized transfer of Covered Information to a third party pursuant to customer authorization or Commission order, PG&E shall not be responsible for the security of the Covered Information or data or its use or misuse by a third party."
- C. The SMD platform is designed primarily to provide Customer Data from the PG&E's back office systems. That Customer Data may not be complete or accurate, and may be updated before and after bills are issued to customers. The Customer Data on the SMD platform is transmitted on an "as is" and "as available" basis. PG&E shall not be liable for the inability of customers or their authorized third parties to access the SMD platform, or for PG&E's delay in updating or failure to update any information, for whatever reason. (T)
I (T)
- D. PG&E does not warrant that the SMD platform will be timely, secure, uninterrupted, or error-free, or that defects in the SMD platform, as may exist from time to time, will be corrected. PG&E will not be responsible for errors, omissions, interruptions, deletions, defects or delays in the operation of or transmission of Customer Data through the SMD platform, including those due to communication line failures, or computer viruses associated with the operation of PG&E's website or platform. (T)
(T)
- E. PG&E, its affiliates or subsidiaries, and their officers, directors, employees, agents, successors, or assigns, will not be liable to customers or any third party for any indirect, consequential, incidental, exemplary, special or punitive damages resulting from lost Customer Data or lost profits arising out of or in connection with the SMD platform. (T)
- F. PG&E does not warrant the immediate revocation of a third party's authorization status without direct notice from the Commission on its change of status to a prohibited party.



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Advice 5229-E-A
Decision

Issued by
Robert S. Kenney
Vice President, Regulatory Affairs

Submitted
Effective
Resolution

October 18, 2018



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Attachment 2

Redline Tariffs



CUSTOMER INFORMATION SERVICE **REQUEST FOR SHARE MY DATA (CISR-SMD)** **CUSTOMER AUTHORIZATION OR** **REVOCATION OF AUTHORIZATION FORM**

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

This form allows you to ~~voluntarily submit~~create a new ~~authorization for~~Authorization to grant a Third Party ~~of your choice you specify to have~~access to your PG&E ~~personal, energy usage, energy billing and other program data about you~~personal, energy usage, energy billing and other program data about you via ~~the PG&E's~~the PG&E's Share My Data (SMD) platform or to modify or ~~cancel~~revoke an existing ~~authorization~~Authorization you currently have on the Share My Data platform. This form should be completed by the main Customer Account Holder (name on the PG&E bill), or the Customer's Authorized Agent.

~~Please Note: Share My Data is only available to customers who agree with the Third Party to provide between 24 to 48 months of historical data, as designated by the Third Party at the time of registration for Share My Data. If you do not wish to authorize release of 24 to 48 months of historical data, you must authorize access for the Third Party by using PG&E Form 79-1095, Authorization to Receive Customer Information or Act Upon a Customer's Behalf.~~

Pacific Gas and Electric Company's (PG&E's) Gas and Electric Rules 27 and its corresponding privacy policies, which can be found at www.pge.com/about/company/privacy/customer, do not allow for the disclosure of customers' personal information, such as your name, address, phone number, or electric account and billing information, to third parties for purposes other than providing utility services to you or as otherwise required by law, unless you expressly authorize us to do so. This form allows you to exercise your right to disclose personal and energy-related information about you to a Third Party under PG&E's Electric Rule 25 which can be found at www.pge.com/tariffs/tm2/pdf/ELEC_RULES_25.pdf. This form may be used to authorize the release of electric-related information for Bundled, Community Choice Aggregation (CCA), Direct Access (DA) customers, and gas-related information for Core End-Use and Noncore End-Use customers. When you authorize access by a Third Party to personal and energy-related information about you, you are responsible for and agree that you are solely responsible for ensuring that the Third Party safeguards this information from further disclosure without your consent.

If you want to provide data to a Demand Response Provider (DRP), please use "Customer Information Service Request For Demand Response Provider" (CISR-DRP), Form 79-1152.

This agreement at all times shall be subject to such modifications 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.

STEP 1: AUTHORIZATION DETAILS

~~Complete the applicable Section, and then go to Step 2~~

- Please select the action you wish to take:**

- ☐ **CREATE** A NEW AUTHORIZATION – Please Complete [SECTION 1](#)
- ☐ **MODIFY** AN EXISTING AUTHORIZATION – Please Complete [SECTION 2](#)
- ☐ ~~CANCEL~~ **REVOKE** AN EXISTING AUTHORIZATION – Please Complete [SECTION 3](#)



CUSTOMER INFORMATION SERVICE
REQUEST FOR SHARE MY DATA (CISR-SMD)
CUSTOMER AUTHORIZATION OR
REVOCATION OF AUTHORIZATION FORM

[SECTION 1: CREATE A NEW AUTHORIZATION]

• **Your Contact Information:**

First Name: _____ Last Name: _____

Mailing Address: _____

Please provide either an email address or your My Account User Name:

☐ Email Address (Optional): _____
(The email address you provide here will be used for all transactional emails relating to this ~~authorization~~Authorization.)

OR

☐ My Account User Name: _____
(If you provide your My Account User Name you will have the ability to modify or cancel/revoke this authorizationAuthorization via My Account, your PG&E online account. All transactional emails relating to this authorizationAuthorization will be sent to the email address associated to your My Account account.)



CUSTOMER INFORMATION SERVICE **REQUEST FOR SHARE MY DATA (CISR-SMD)** **CUSTOMER AUTHORIZATION OR** **REVOCAION OF AUTHORIZATION FORM**

[SECTION 1: CREATE A NEW AUTHORIZATION]

- **Third Party:**

Please provide the name of the Third Party you authorize to access your data via the Share My Data platform. You may ~~only~~ authorize only those third parties who have registered with PG&E to use the Share My Data platform. This form will not be processed if you list a Third Party who has not registered to use the Share My Data platform.

Name of Third Party: _____

(PLEASE NOTE: PG&E has not conducted vendor security reviews on the Share My Data registered Third Parties.

Please be sure to read Terms and Conditions offered by the Third Party prior to authorizing the Third Party to access your data).)

- **Data Elements:**

Please select the data elements you wish to authorize (you may select more than one data element):

☒ **Basic Information** (Includes name and service address)

☐ **Billing Information** (Includes up to 48 months historical, current, and ongoing billing records, billing ~~history, billing~~ and meter read dates, rate schedule, and voltage class).)

☐ **Account Information** (Includes account number(s), service agreement number(s), and service start date).)

☐ **Usage Information** (Includes ~~Electric~~up to 48 months of historical, current, and ongoing electric and/or ~~Gas~~gas usage data used for bill calculations, interval usage, and interval time-of-use indicators).)

☐ ~~Demand Response (DR)~~ **PG&E Program Enrollment Information** (Includes current and ongoing PG&E DR-Demand Response program name/ and status, as well as the name and status of other PG&E programs in which you are enrolled and CAISO program).)

- **Authorization Period:**

The Third Party will automatically have access to ~~24~~up to 48 months of historical data from the date the ~~authorization~~Authorization is created.

Please select the period of time you wish to authorize the Third Party, listed above, to have ongoing access to the data elements selected above:

☒ Ongoing Access Until _____ or until I revoke this Authorization.
[Date]

OR
[Date]

OR

☒ Indefinitely until I revoke this ~~authorization or my account(s) are~~Authorization.

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



CUSTOMER INFORMATION SERVICE
REQUEST FOR SHARE MY DATA (CISR-SMD)
CUSTOMER AUTHORIZATION OR
REVOCATION OF AUTHORIZATION FORM

- **Service Agreement IDs to be Authorized ~~by the Customer Account Holder~~:**

Please list the Account Number(s) and Service Agreement ID(s) you, as the Customer Account Holder, are authorizing the specified Third Party to access via the Share My Data platform:

Account Number	Service Agreement ID

(For more than three Service Agreement IDs please attach a separate file)



CUSTOMER INFORMATION SERVICE REQUEST FOR SHARE MY DATA (CISR-SMD) CUSTOMER AUTHORIZATION OR REVOCATION OF AUTHORIZATION FORM

[SECTION 2: MODIFY AN EXISTING AUTHORIZATION]

• ~~Your Contact Information:~~

First Name: _____ Last Name: _____

Mailing Address: _____

• **Subscription ID:**

Please provide the Subscription ID associated to the ~~authorization~~Authorization you wish to modify. Your Subscription ID can be found in the confirmation email sent to you when the ~~authorization~~Authorization was initially created. If you cannot find your Subscription ID, please contact PG&E Customer Service at (800) 743-5000 for assistance.

Subscription ID: _____

• **Authorization Period:**

~~If you would like to modify the authorization period, please specify the new date below.~~

[-]/ [-]/ [-] _____ Ongoing Access Until
_____, _____ or until I revoke this Authorization.
[Date]
[Date]

OR

[-] Indefinitely until I revoke this ~~authorization or my account(s) are~~Authorization.

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

• **Service Agreement IDs to be added and/or removed from Authorization by the Customer Account Holder**

If you would like to add or remove Service Agreement IDs from this Authorization, please specify them below.

Account Number	Service Agreement ID	Add	Remove
		☐	☐
		☐	☐
		☐	☐

(For more than three Service Agreement IDs please attach a separate file)

[SECTION 3: ~~CANCEL~~REVOKE AN EXISTING AUTHORIZATION]

• ~~Your Contact Information:~~

First Name: _____ Last Name: _____



CUSTOMER INFORMATION SERVICE
REQUEST FOR SHARE MY DATA (CISR-SMD)
CUSTOMER AUTHORIZATION OR
REVOCATION OF AUTHORIZATION FORM

Mailing Address: _____

- **Subscription ID:**

Please provide the Subscription ID associated to the ~~authorization~~Authorization you wish to ~~cancel~~revoke. Your Subscription ID can be found in the confirmation email sent to you when the ~~authorization~~Authorization was initially created. If you cannot find your Subscription ID, please contact PG&E Customer Service at (800) 743-5000 for assistance.

Subscription ID: _____



CUSTOMER INFORMATION SERVICE REQUEST FOR SHARE MY DATA (CISR-SMD) CUSTOMER AUTHORIZATION OR REVOCATION OF AUTHORIZATION FORM

STEP 2: AGREE TO SHARE MY DATA TERMS AND CONDITIONS

Important information: Please read carefully. This is a legally binding agreement.

~~Create a New The purpose of this form is to allow you to exercise your right to choose whether to disclose your personal electricity usage data, total billed usage or monthly billing dates, and Demand Response Program enrollment information (only if the Demand Response Program enrollment information is required by the Third Party with whom you are choosing to share your data) to a Third Party.~~

~~Once you authorize a Third Party to access your personal information, you are responsible for ensuring that the Third Party safeguards the personal information from further disclosure without your consent. By signing below, you agree that you have read, understood and authorize PG&E to release the requested information on your account(s) to the designated Third Party, and you hereby release, hold harmless and indemnify PG&E from any liability, claims, demands, causes of action, damages or expenses resulting from:~~

- ~~1. Any release of information to your designated Third Party pursuant to this Authorization and Agreement~~
- ~~2. The unauthorized use of this information by the designated Third Party~~
- ~~3. Any actions taken by the Third Party pursuant to this Authorization and Agreement~~

~~You also understand that you may cancel this authorization at any time by completing and submitting Section 3 of this form or via My Account if you have provided a My Account user name. Finally, you understand you will receive emails regarding your Share My Data authorization.~~

- **Customer Authorization to Release Information or Modify an Existing Authorization:**

I-~~(, (First and Last Name of Customer _of Record Account Holder~~Account Holder),
~~, or Agent),~~

authorize the designated Third Party to access ~~my~~the Customer of Record Account Holder's personal energy data ~~from in accordance with these terms and conditions for the designated accounts, Service Agreement(s) as indicated in Section 1 for new Authorizations or Section 2 for modifying an existing Authorization~~above and in accordance with these terms and conditions.



CUSTOMER INFORMATION SERVICE
REQUEST FOR SHARE MY DATA (CISR-SMD)
CUSTOMER AUTHORIZATION OR
REVOCATION OF AUTHORIZATION FORM

CUSTOMER ACCOUNT HOLDER SIGNATURE _____
DATE _____

~~Customer, I further understand that the Customer of Record's information may be transmitted to the Third Party even after this Authorization for Revocation~~
~~I (Customer Account Holder), _____, revoke the~~~~has ended, limited to~~
~~updates to the data for the time period during which this Authorization was valid. I~~
~~understand PG&E reserves the right to verify any authorization request submitted before~~
~~releasing information on my behalf.~~

~~I declare that I am authorized to execute this Authorization manually or electronically on behalf of the Customer of Record Account Holder, and that I have authority to bind the Customer of Record Account Holder. 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 Third Party pursuant to this Authorization; (2) the unauthorized use of this information by the Third Party or any other third party; and (3) any actions taken by the Third Party 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 Revocation check box selected. I hereby indicate my consent to execute and submit this Authorization electronically.~~

Signature of Customer or Agent Date _____

• **Customer Authorization for Revocation**~~Revoke an Existing Authorization:~~

~~I, (First and Last Name of Customer of Record or Agent), _____,~~
~~revoke the Authorization~~ of the designated Third Party to access personal data about me
from the designated ~~accounts.~~ Service Agreement(s).

CUSTOMER ACCOUNT HOLDER SIGNATURE DATE _____

~~I declare that I am authorized to execute this Revocation manually or electronically on behalf of the Customer of Record Account Holder, and that I have authority to bind the Customer of Record Account Holder. 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 Third Party pursuant to this Revocation; and (3) any conduct by the Third Party in connection with this Revocation. I hereby indicate my consent to execute and submit this Revocation electronically.~~

Signature of Customer or Agent Date _____



CUSTOMER INFORMATION SERVICE
REQUEST FOR SHARE MY DATA (CISR-SMD)
CUSTOMER AUTHORIZATION OR
REVOCATION OF AUTHORIZATION FORM

STEP 3: SUBMIT FORM VIA EMAIL OR MAIL

~~Forms can be emailed to:~~

~~sharemydata@pge.com~~

~~Forms can be mailed to:~~

~~Pacific Gas and Electric Company
Share My Data N8A
77 Beale Street
San Francisco, CA 94105~~

Forms can be emailed to:
sharemydata@pge.com

Forms can be mailed to:
Pacific Gas and Electric Company
Share My Data
245 Market Street, N3E
San Francisco, CA 94105



ELECTRIC RULE NO. 25
RELEASE OF CUSTOMER DATA TO THIRD PARTIES

Sheet 1

I. APPLICABILITY

The following rules apply to PG&E's automated, ongoing provisioning of ~~energy related~~~~electric SmartMeter™ interval usage~~ data,¹ henceforth referred to as "Customer Data," to customer-authorized third-parties using an electronic platform known as ~~Share My Data (SMD) ²the Customer Data Access (CDA) platform~~. The ~~Customer D~~data available through this platform is specifically identified in PG&E's ~~customer release form (79-1147)~~, titled "~~Customer Information Service Request For Share My Data~~" (CISR-SMD) (Form 79-1186)~~Authorization or Revocation of Authorization to Receive Customer Interval Usage Information~~". ~~_(CISR-CDA)_~~. This tariff rule governs PG&E and the following parties:

1. PG&E customers with open service ~~accounts agreements for electric service as a Bundled, Community Choice Aggregation (CCA), and Direct Access (DA) customer, and gas service as a Core End-Use and Noncore End-Use customer and where advanced metering is installed~~; and
2. Third parties authorized by PG&E customers in a customer information release form (as designated on Form 79-~~1147~~1186) to receive Customer Data provided that the third parties comply with PG&E's Electric Rule 27 and are eligible pursuant to Section III below. A copy of Rule 27 may be found at PG&E.com.

II. CUSTOMER AUTHORIZATION/REVOCAION

- A. **Customer Authorization:** Upon receipt of a completed, executed ~~CISR-SMDonline customer information release form (Form 79-1147)~~ and third party adherence to this Rule, PG&E shall make Customer Data available to eligible customer-authorized third parties within one to five days.
- B. **Customer-Initiated Revocation of Authorization:** Customers may revoke a third party's authorization to receive Customer Data at any time. Upon receiving the revocation request, PG&E shall cease transmission of the ~~customer's data~~Customer Data and shall notify the third party via electronic notification provided by the Third Party within one business day of the customer's revocation of authorization.
- C. **Other Means of Revocation of Authorization:** Authorization for a third party to receive Customer Data may also be revoked automatically by the Commission pursuant to Section V below, or if a third party otherwise becomes ineligible for failure to meet the other requirements of Section V below.

(Continued)



ELECTRIC RULE NO. 25

Sheet 1

RELEASE OF CUSTOMER DATA TO THIRD PARTIES

¹ Additional data types may be available through this platform in the future.

(N)

² The Share My Data (SMD) platform was formally named Customer Data Access (CDA) platform.

(Continued)

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Decision 13-09-025

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Vice President
Regulatory Relations

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ELECTRIC RULE NO. 25
RELEASE OF CUSTOMER DATA TO THIRD PARTIES

Sheet 2

III. SERVICE OFFERING

(N)

- A. **Availability of Data:** Customer-authorized third parties must retrieve the Customer Data for a given day five days of it being made available by the data custodian after which time that ~~data-Customer Data~~ may be removed. PG&E reserves the right to charge fees for re-transmission of ~~data-Customer Data~~ that third parties failed to retrieve in a timely manner.
- B. **Description of Data:** At the customer's election, authorized third parties meeting the eligibility criteria in Section IV below shall electronically receive Customer Data ~~which shall at a minimum include, thirteen months of historical interval usage data, and, on an ongoing basis as needed, next day, interval usage data,~~ in a data format consistent with national standards codified by and maintained at the North American Energy Standards Board (NAESB) known as the NAESB Energy Service Provider Interface (ESPI) Standard. ~~The applicable portion of the Customer Data governed by this Rule shall correspond to the interval usage data recorded by the customers' meters.~~ PG&E shall update the data format available through the CDASMD platform to the extent the NAESB ESPI standards are modified from time to time.
- C. **Data Updates:** PG&E will transmit Customer Data once per day after it becomes available. Customer Data transmitted at the end of each day is the most current information at that time and includes any data updates throughout the day. Customer Data that is updated ~~for any prior interval transmitted under this Rule~~ will be provided to the third party subject to availability and consistent with PG&E's requirements under Rules 17, 17.1, or 17.2 when the update is done as a result of a bill adjustment. Any updates of previously transmitted ~~Ccustomer Ddata~~ that occurred in the previous 24 hours will be provided along with the usually provided previous day's ~~interval data~~Customer Data. The "Reading Quality" flag as provided in the NAESB Energy Service Provider Interface (ESPI) Standard will be employed to indicate the quality of meter data provided through the CDASMD platform.³² A Reading Quality flag will also be used to indicate when this data becomes "revenue quality."⁴³ PG&E bears no obligation to transmit Customer Data once a customer's authorization of the third party's right to receive the data has expired or is otherwise terminated, as referenced in Section IV, below.
- D. **Cost:** PG&E shall make Customer Data available through the CDASMD platform free of charge to customer-authorized third parties provided that the ~~Customer Data~~data is retrieved timely under Section III.A. above. Nothing in this Rule is intended to modify, directly or indirectly, service or data fees established in other applicable tariff rules or schedules.

³² North American Energy Standards Board (NAESB) Energy Service Provider Interface (ESPI) Standard pgs. 25 and 28

⁴³ "Revenue quality" meter data is defined as usage data that has passed validation, estimating and editing processes in accordance with the Direct Access Standards for Metering and Meter Data (DASMMMD) as described in Electric Rule 22 and is acceptable for billing purposes. A (Continued)



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**Pacific Gas and
Electric Company®**

San Francisco, California

Original

Cal. P.U.C. Sheet No.

34334-E

ELECTRIC RULE NO. 25
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Sheet 2

more detailed explanation of quality of meter read data can be found at PG&E's website.

(N)

(Continued)

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ELECTRIC RULE NO. 25
RELEASE OF CUSTOMER DATA TO THIRD PARTIES

Sheet 3

IV. THIRD-PARTY ELIGIBILITY REQUIREMENTS

(N)

Third Parties are subject to the following conditions in order to obtain and maintain access to Customer Data.

1. **Provide and Update Contact Information:** Third parties must input basic contact information at PG&E's **GDASMD** Third Party Registration Web Page, including company/entity's name, federal tax identification number, mailing address, and the names, telephone numbers, mailing addresses, and email addresses for any key business and technical contacts at the company/entity. Third parties are solely responsible for making timely updates to that information, as may be required from time to time.
2. **Technical Eligibility:** Third parties must demonstrate connectivity aptitude through the machine-to-machine verification of the third parties' technical feasibility to receive **C**eustomer **D**eata securely from PG&E, to be described in more detail at PG&E's **GDASMD** Third Party Registration Web Page. PG&E shall work in good faith to resolve technical issues that may arise with third parties seeking technical eligibility. Such work will be limited to connectivity to the **GDASMD** platform and PG&E will put forth a reasonable effort to resolve technical issues regarding such connectivity. PG&E will not provide technical consulting to resolve any connectivity issues on the side of the third party. Technical eligibility criteria may change, from time to time, consistent with the NAESB ESPI Standard.
3. **Acknowledge Receipt of Applicable Tariff:** Upon determining that a third party is technically eligible to receive Customer Data as provided in Section IV.2, above, the third party must acknowledge receipt of and has read and understands the terms and conditions of PG&E's Rule 27 and this Rule.
4. **Transparency:** Third parties shall continue to provide customers with clear notice regarding their accessing, collection, storage, use, and disclosure of Customer Data.
5. **Identifier:** Third party shall provide PG&E with a Federal Tax ID number which can be used to track its registration in **GDASMD** across the state utilities.

Currently authorized third party agents can be found at PG&E's website.

(N)

(Continued)

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ELECTRIC RULE NO. 25
RELEASE OF CUSTOMER DATA TO THIRD PARTIES

Sheet 4

V. THIRD PARTY INELIGIBILITY BY ORDER OF THE COMMISSION

(N)

- A. Commission's List of Prohibited Third Parties:** Pursuant to D.13-09-025, the Commission may create and maintain a list of third parties whom the Commission has determined are not eligible to receive Customer Data~~customer usage data~~, even when authorized by the customer, under the GDASMD platform. The list shall be posted on the Commission's website at www.cpuc.ca.gov. Should a third party be included on this list, PG&E will deem the list to be an order by the Commission declaring the party ineligible to participate on the GDASMD platform unless and until either (a) the party's name is lifted from the Commission's list of entities prohibited from receiving ~~customer usage data~~Customer Data; or (b) the Commission's order has been stayed or enjoined by the appropriate court or agency. The Commission will also provide direct notification to the PG&E regarding any changes to the list. PG&E is not responsible for creating maintaining or continuously monitoring the Commission's list.
- B. PG&E's Actions With Respect To Commission List:** Customers will have access to a "potential violation" form on PG&E's website which they can electronically submit to PG&E if they suspect third party mishandling of data or non-compliance with this Rule or Rule 27. Customers may also call PG&E Call Center Line to report these suspicious activities. After reviewing case, and in the event that PG&E reasonably suspects that a third party has violated state law or the Commissions' privacy rules, it shall serve the third party and the Commission's Energy Division with a notice of the suspected tariff violation along with any information regarding possible wrongdoing. PG&E shall seek to resolve the suspected tariff violations with the third party during a 21-day resolution period, during which time PG&E will continue transmission of Customer Data~~data~~ unless otherwise requested by the customer. At its discretion, the Energy Division staff may facilitate resolution of the issues between PG&E and the third party, and may grant an additional 21-day period for resolving the issue. If the matter is not resolved during the period set for resolution, PG&E shall file a Tier 2 advice letter seeking to move the third party to the list of entities ineligible to receive Customer Data via the GDASMD platform. PG&E shall provide notice of this filing to all customers who have selected that third party to receive their Customer Data. Until Commission action resolves the matter, PG&E will continue to transmit Customer Data, unless otherwise requested by the customer.
- C. Commission Authority and Discretion:** The Commission has authority to reduce or eliminate the 21-day resolution period referenced in the immediately preceding subsection. The Commission also has the authority to address the advice letter referenced in Section V.B above in an expedited manner, the authority to investigate the issue on its own motion, the authority to address a complaint filed at the Commission by the customer concerning the rules and obligations under this tariff or Rule 27, and the authority to determine the appropriate remedy, if necessary, for any tariff violation.
- D. Customer Authorization:** Successful and valid "registration" with PG&E, pursuant to Sections II.A through V.C above, are necessary but not sufficient conditions before a third party can receive Customer Data~~interval usage data~~ under this Rule. Valid and current customer authorization pursuant to Section II is required for ~~data~~Customer Data release under this tariff.

(N)

(Continued)

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ELECTRIC RULE NO. 25
RELEASE OF CUSTOMER DATA TO THIRD PARTIES

Sheet 5

VI. LIMITATIONS OF LIABILITY

- (N)
- A. PG&E shall not be deemed to have transmitted Customer Data recklessly provided that it follows the requirements of D.13-09-025 as incorporated in this Rule and Rule 27.
- B. The limitation of liability included in Section 9.f. of Rule 27 is incorporated herein as follows: "PG&E shall not be liable for any claims, demands, causes of actions, damages, or expenses arising from or resulting from any release of Covered Information or other confidential customer information pursuant to a customer's written authorization, legal process or the Commission's order; the unauthorized use of Covered Information or other confidential customer information by a third party receiving such information from PG&E pursuant to a customer's written authorization, legal process or the Commission's order; or any actions taken by a customer-authorized third party. After PG&E makes a secure and authorized transfer of Covered Information to a third party pursuant to customer authorization or Commission order, PG&E shall not be responsible for the security of the Covered Information or data or its use or misuse by a third party."
- C. The GDASMD platform is designed primarily to provide ~~next-day interval~~ Customer Data from the PG&E's back office systems. That Customer Data-data may not be complete or accurate, and may be updated before and after bills are issued to customers. The Customer Ddata on the GDASMD platform is transmitted on an "as is" and "as available" basis. PG&E shall not be liable for the inability of customers or their authorized third parties to access the GDASMD platform, or for PG&E's delay in updating or failure to update any information, for whatever reason.
- D. PG&E does not warrant that the GDASMD platform will be timely, secure, uninterrupted, or error-free, or that defects in the GDASMD platform, as may exist from time to time, will be corrected. PG&E will not be responsible for errors, omissions, interruptions, deletions, defects or delays in the operation of or transmission of ~~data~~ Customer Data through the GDASMD platform, including those due to communication line failures, or computer viruses associated with the operation of PG&E's website or platform.
- E. PG&E, its affiliates or subsidiaries, and their officers, directors, employees, agents, successors, or assigns, will not be liable to customers or any third party for any indirect, consequential, incidental, exemplary, special or punitive damages resulting from lost ~~data~~ Customer Data or lost profits arising out of or in connection with the GDASMD platform.
- F. PG&E does not warrant the immediate revocation of a third party's authorization status without direct notice from the Commission on its change of status to a prohibited party.
- (N)

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

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