



**Gas Sample Form No. 79-1173**

Sheet 1

Energy Efficiency Financing Pilot Programs

Authorization or Revocation of Authorization to Release Customer Information

**Please Refer to Attached  
Sample Form**

## ENERGY EFFICIENCY FINANCING PILOT PROGRAMS AUTHORIZATION OR REVOCATION OF AUTHORIZATION TO RELEASE CUSTOMER INFORMATION

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***This Authorization or Revocation of Authorization to Release Customer Information*** (“Authorization”): (1) authorizes Pacific Gas and Electric Company (“PG&E”) to release your energy usage data to the Master Servicer, which will release such data to the Data Manager and Contractor Manager, all in accordance with the rules of, and as a condition of your participation in PG&E’s Energy Efficiency Financing Pilot Programs (“Programs”), as administered by CAEATFA; or (2) revokes an existing Authorization.

If you do not wish to share your energy usage data as described herein, you are not required to fill out this Authorization, but you will be unable to participate in the Programs.

You may also revoke your authorization at any time after signing this Authorization, but such revocation may lead to the termination of your participation in the Programs and may breach the terms and conditions of your loan or lease agreement with your lender.

**Definitions:**

“**CAEATFA**”: The California Alternative Energy and Advanced Transportation Financing Authority, a public instrumentality of the State of California, or its agents, that administer the Programs for the California investor-owned utilities, or any successor administrator approved by the California Public Utilities Commission (“CPUC”).

“**Contractor Manager**”: An entity hired by and under contract with CAEATFA to manage qualified contractor activity under the Programs. The Contractor Manager will perform quality assurance procedures for which it may require the customer contact information and the installed project information. The Contractor Manager’s contract with CAEATFA will require the Contractor Manager to protect the confidentiality of your contact and project information and prevent unauthorized contact and project information from being released to any other entity. CAEATFA may assume the obligations of the Contractor Manager.

“**Data Manager**”: An entity hired by and under contract with CAEATFA solely to collect statewide energy usage data and data regarding the financial products provided to customers participating in the Programs and build a database for the aggregated and anonymized data provided by the Master Servicer. The Data Manager’s contract with CAEATFA will require the Data Manager to protect the confidentiality of your usage data and prevent unauthorized disclosure of your usage data to any other entity. CAEATFA may assume the obligations of the Data Manager.

“**Master Servicer**”: An entity hired by and under contract with CAEATFA. The Master Servicer will use customer energy usage data solely to: (1) establish a master file including project and financial product data for each loan and lease enrolled in the Programs; and (2) develop and update financial product servicing data files to be maintained throughout the term during which the loans and leases are enrolled in the Programs. The Master Servicer’s contract with CAEATFA requires the Master Servicer to protect the confidentiality of your usage data and prevent unauthorized disclosure of your usage data to any other entity. The Master Servicer will aggregate and anonymize the data for the purpose of evaluating the Programs. CAEATFA may assume the obligations of the Master Servicer.



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## A: CREATE A NEW AUTHORIZATION

Please complete sections 1-4 (Pages 2-5)

### Section 1: Contact Information

(A) First Name: \_\_\_\_\_

(B) Last Name: \_\_\_\_\_

(C) Business Name (if applicable): \_\_\_\_\_

(D) Title of Contact (if applicable): \_\_\_\_\_

(E) Mailing/Billing Address: Street: \_\_\_\_\_

City: \_\_\_\_\_ Zip: \_\_\_\_\_

(F) Phone Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

(G) Email Address: \_\_\_\_\_

### Section 2: Authorization Period:

This Authorization is effective upon your execution and authorizes PG&E to release and provide ongoing access to your monthly energy usage data to the Master Servicer (which will release such data to the Data Manager and Contractor Manager in accordance with the rules of the Programs) for the period commencing on the date that is twelve (12) months before the date that you sign this Authorization and ending on (J) \_\_\_ / \_\_\_ / \_\_\_ [check with your lender and insert the end of your loan or lease term].



# ENERGY EFFICIENCY FINANCING PILOT PROGRAMS AUTHORIZATION OR REVOCATION OF AUTHORIZATION TO RELEASE CUSTOMER INFORMATION

## Section 3: Service Agreement IDs to be Authorized

### RESIDENTIAL ACCOUNTS

Please specify the Service Agreement ID(s) under which you are authorizing the Master Servicer, Data Manager and Contractor Manager to access your energy usage data. Your Account Number (11 digits) and Service Agreement ID (SAID) (10 digits) can be found on your monthly energy statement. If you receive both Gas and Electric service from PG&E, please provide Service Agreement IDs (SAIDs) for both.

Gas Service    Electric Service    Gas and Electric Service

(L1) Service Address Street: \_\_\_\_\_

City: \_\_\_\_\_ Zip: \_\_\_\_\_

(M1) Gas SAID \_\_\_\_\_ (N1) Account Number (first 10 digits) \_\_\_\_\_

(M2) Electric SAID \_\_\_\_\_ (N2) Account Number (first 10 digits) \_\_\_\_\_

### COMMERCIAL ACCOUNTS

Please list all Service Addresses where you had Energy Efficiency work done as part of your financing agreement. Include all Service Agreement IDs (SAID) and corresponding Utility Account Numbers for those addresses for the fuel source(s) that your contractor has designated as to where you will experience savings. Please only provide the first 10 digits of the Account number.

(L1) Service Address Street: \_\_\_\_\_

City: \_\_\_\_\_ Zip: \_\_\_\_\_

(M1) SAID \_\_\_\_\_ (N1) Account Number (first 10 digits) \_\_\_\_\_  Gas  Electric

(M2) SAID \_\_\_\_\_ (N2) Account Number (first 10 digits) \_\_\_\_\_  Gas  Electric

(M3) SAID \_\_\_\_\_ (N3) Account Number (first 10 digits) \_\_\_\_\_  Gas  Electric

(L2) Service Address Street: \_\_\_\_\_

City: \_\_\_\_\_ Zip: \_\_\_\_\_

(M4) SAID \_\_\_\_\_ (N4) Account Number (first 10 digits) \_\_\_\_\_  Gas  Electric

(M5) SAID \_\_\_\_\_ (N5) Account Number (first 10 digits) \_\_\_\_\_  Gas  Electric

(M6) SAID \_\_\_\_\_ (N6) Account Number (first 10 digits) \_\_\_\_\_  Gas  Electric

*(For more than two service addresses, please attach additional copies of this page)*



## ENERGY EFFICIENCY FINANCING PILOT PROGRAMS AUTHORIZATION OR REVOCATION OF AUTHORIZATION TO RELEASE CUSTOMER INFORMATION

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### Section 4: AGREE TO TERMS AND CONDITIONS

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

**By signing this Authorization, you are authorizing the Master Servicer, Data Manager and Contractor Manager for the Programs to have access to your PG&E energy usage data, consisting of your electricity and natural gas usage data, for the property where you have installed eligible Program measures. Your PG&E energy usage data is independent from any information that a bank or other lender may require you to provide as a condition of your participation in the Programs.**

Once you authorize the release of your energy usage data to the Master Servicer, the Data Manager and the Contractor Manager, these entities and not PG&E or your lender, are responsible for ensuring the safety and security of your information.

By checking the box and signing below, you attest that you have read, understood, agree and authorize PG&E to release the requested information on your account(s) to the Master Servicer, (which will release such data to the Data Manager and the Contractor Manager in accordance with the rules of the Programs), and you hereby release, hold harmless and indemnify PG&E from any liability, claims, demands, causes of action, damages or expenses arising out of or in connection with:

1. Any release of information to the Master Servicer and/or the Data Manager and/or Contractor Manager pursuant to this Authorization;
2. The unauthorized use of this information by the Master Servicer and/or the Data Manager and/or the Contractor Manager; and/or
3. Any actions taken by the Master Servicer and/or the Data Manager and/or the Contractor Manager pursuant to their receipt of your energy usage data.

You also understand and acknowledge that you may revoke this Authorization at any time by completing and submitting to PG&E Section B of this Authorization or via My Energy if you have provided a MyEnergy User Name. Your participation in the Programs may be terminated if you revoke this Authorization during your participation in the Programs, and such revocation may breach the terms and conditions of your loan or lease agreement with your lender.

I understand that this form 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.

Finally, you consent to receive transactional emails regarding this Authorization.

Please check the appropriate box below and sign and date this Authorization.



# ENERGY EFFICIENCY FINANCING PILOT PROGRAMS AUTHORIZATION OR REVOCATION OF AUTHORIZATION TO RELEASE CUSTOMER INFORMATION

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I, **(P)** \_\_\_\_\_ [print name of authorized signatory], authorize PG&E to provide the Master Servicer access to the energy usage data from the designated accounts in accordance with these terms and conditions. I understand that, pursuant to such authorization and in accordance with the rules of the Programs, the Master Servicer will release such energy usage data to the Data Manager and the Contractor Manager.

By signing below, I declare under penalty of perjury under the laws of the State of California that I am authorized to execute this document on behalf of the Customer and that I have authority to financially bind the Customer. I understand PG&E reserves the right to verify any authorization request submitted before releasing information or taking any action on my behalf. [*This Authorization must be signed by someone who has authority to financially bind the customer (for example, CFO of a company or City Manager of a municipality).*].

**(Q)** \_\_\_\_\_  
*AUTHORIZED CUSTOMER SIGNATURE*

\_\_\_\_\_  
*PRINT NAME*

\_\_\_\_\_  
*TITLE*

**(R)** \_\_\_\_\_  
*DATE*



# ENERGY EFFICIENCY FINANCING PILOT PROGRAMS AUTHORIZATION OR REVOCATION OF AUTHORIZATION TO RELEASE CUSTOMER INFORMATION

## B: REVOKE AN EXISTING AUTHORIZATION

### Section 1: Contact Information

I understand that I may revoke this Authorization at any time by filling out this revocation and executing below. Revoking this Authorization may breach the terms and conditions of your loan or lease agreement with your lender.

• **Contact Information:**

(A) First Name: \_\_\_\_\_

(B) Last Name: \_\_\_\_\_

(C) Business Name (if applicable): \_\_\_\_\_

(D) Title of Contact (if applicable): \_\_\_\_\_

(E) Mailing/Billing Address: Street: \_\_\_\_\_

City: \_\_\_\_\_ Zip: \_\_\_\_\_

(F) Phone Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

(G) Email Address: \_\_\_\_\_

### Service Agreement IDs to be revoked:

Please provide the Service Agreement ID associated with the Authorization you wish to revoke. Your Account Number and Service Agreement ID can be found on your PG&E bill. If you receive both Gas and Electric service from PG&E, please provide Service Agreement IDs (SAIDs) for both. (The SAIDs are located in the "Details of Gas/Electric" part of your monthly Energy Statement and is 10 digits long. The Account Number is located at the top right corner of your monthly Energy Statement and is 10 digits long)

(L) Service Address Street: \_\_\_\_\_

City: \_\_\_\_\_ Zip: \_\_\_\_\_

(M1) Gas SAID \_\_\_\_\_ (N1) Account Number \_\_\_\_\_

(M2) Electric SAID \_\_\_\_\_ (N2) Account Number \_\_\_\_\_

*(For additional Service Addresses or SAIDs, please attach additional copies of this page)*

• **Subscription ID:**

Please provide the Subscription ID associated with 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.

Subscription ID (if available): \_\_\_\_\_



# ENERGY EFFICIENCY FINANCING PILOT PROGRAMS AUTHORIZATION OR REVOCATION OF AUTHORIZATION TO RELEASE CUSTOMER INFORMATION

## TO REVOKE AN EXISTING AUTHORIZATION

(P) I, \_\_\_\_\_ [print name of authorized signatory], instruct PG&E to cease to provide the Master Servicer access to the energy usage data from the designated accounts in accordance with these terms and conditions.

By signing below, I declare under penalty of perjury under the laws of the State of California that I am authorized to execute this document on behalf of the Customer and that I have authority to financially bind the Customer. I understand PG&E reserves the right to verify any authorization request submitted before releasing information or taking any action on my behalf. [*This Authorization must be signed by someone who has authority to financially bind the customer (for example, CFO of a company or City Manager of a municipality).*].

(Q) \_\_\_\_\_  
AUTHORIZED CUSTOMER SIGNATURE

\_\_\_\_\_  
PRINT NAME

\_\_\_\_\_  
TITLE

(R) \_\_\_\_\_  
DATE

## C: SUBMIT AUTHORIZATION

This Authorization must be sent according to the following instructions:

Instructions for lenders – Please include an executed Authorization with your loan enrollment or project pre-approval request to CAEATFA per Program instructions. Additional information can be found on CAEATFA’s website: [www.treasurer.ca.gov/CAEATFA/cheef](http://www.treasurer.ca.gov/CAEATFA/cheef).

Instructions for customers to revoke an existing Authorization – Please send the executed Authorization by email to [3PFinancing@pge.com](mailto:3PFinancing@pge.com), or by mail to 300 Lakeside Drive, Oakland, CA 94612