

Rule 24 Click Through Phase 1 Project





Phase 1 Project Scope Overview

- **Enable online authorizations for Rule 24 using Share My Data platform**
- **Redirect customers from third-party web page for authentication and authorization creation**
- **Enable authorizations for up to two DRPs (dual auth)**
- **Design with 2 screens and 4 clicks (happy path)**
- **Desktop and mobile device authorization creation views**
- **Display Terms and Conditions**
- **Data delivery of full Phase 1 data set via APIs**
- **Revocation by DRPs – via API**
- **Support existing CISR-DRP form processing and CAISO Location review process**



Product & Platform Changes

Third Party Registrations

Customer Authorizations

Third Party Portal

API / Data Elements



Product & Platform Changes

3rd Party Registration

- **Affiliations**
 - Enables joint authorizations of 3rd parties
 - Primary
 - Creates & manages registration settings for both companies
 - Secondary
 - Inherits same data access & functionality as Primary


Affiliation Request Workflow






Product & Platform Changes

3rd Party Registration



Share My Data: Registration

Third Party Portal



Step 1: User & Contact Information Step 2: Data Access Information Step 3: Review & Submit

If you are planning to participate in the CAISO market as a Rule 24 Third Party Demand Response Provider, please contact PG&E's Rule 24 team at DRPrelations@pge.com before completing this registration form.

* Required field

User Information

Type of User:*	Standard User	?
Registration Type:*	Choose One	?
Tax ID:*	Primary Secondary	
Company Name:*	Standalone	
	<input type="checkbox"/> Use Company Name as Display Name	
Display Name:*		?
Address Line 1:*		
Address line 2:		

Select Standalone if you only want customers to authorize your company to receive data.

Select Primary if you want customers to authorize your company and a Secondary company to receive data. As a Primary, your company will determine the data authorization parameters that will apply to both you and the Secondary company.

Select Secondary if your company will be affiliated with a Primary for data sharing purposes.



Product & Platform Changes

3rd Party Registration

- New data elements in Program Enrollment
- Rule 24 specific actions: Meter Reprogramming and PDP Disenrollment
- Options for Duration of Authorization:
 - 1 year
 - 3 years
 - 5 years
 - Indefinite

Customer Information

Include Rule 24 Data Elements & Actions:* ? 3

Yes
 No

Indicate which commodity(ies) you require the selected customer information for:* 4

Gas Service(s)
 Electric Service(s)

Indicate the customer information you require:* ? 5

Select All
 Basic Information (Name and Service Address)
 Billing Information (Billing records, billing history, billing and meter read dates, rate schedule, and voltage class)
 Account Information (Account number(s) and service agreement number(s))
 Usage Information (Usage data used for bill calculations, and when available, interval usage and interval time-of-use indicators)
 Program Enrollment (PG&E DR program name/status and CAISO information)
 Meter Reprogram
 PDP Disenroll

How much historical data is requested?:* Choose One

Preferred Duration of Authorization:* Choose One 6 ?

How often will you request data?:* Choose One

How will customers access your solution?:*

Mobile Native Application
 Web Application
 Desktop Application

Please note that the Meter Reprogram action (i.e., shortening the meter interval length from 60 min to 15 min) and PDP Disenroll action (i.e., disenrolling customers that are enrolled in PG&E's Peak Day Pricing program) will only apply to customer authorizations for companies that are registered with PG&E's Rule 24 team.

Preferred duration only applies to Rule 24 authorizations. For all other types, customers will select an indefinite authorization period or a specific authorization expiration date.



Product & Platform Changes

Customer Authorizations

- Two entry points: DRP website, Share My Data (within pge.com)
- Fully responsive pages

Entry Point: DRP Website

Log In Share My Data

customer1

.....

Log In

[Forgot Username or Password](#)

Entry Point: pge.com

PG&E Share My Data

Authorize Access to Your Data

You can authorize a company access to your data. Read the Terms & Conditions carefully before authorizing access to your data. **Please note:** PG&E has not conducted security reviews on the companies participating in this program.

Add new authorization

Select from list

NEXT

Current Authorizations

[Primary 3rd Party name] and [Secondary 3rd Party name]		
Created 01/12/18		
Nest		
Created 02/05/18		



Product & Platform Changes

Customer Authorizations

- 600px optimized page design
- Fully responsive page designs
- Supports Rule 24 specific behaviors
 - Scope elements are read-only
 - Rule 24 actions are read-only
 - All SA IDs selected by default
 - Access duration is defined by 3rd party during registration and is read only

User arrives at login page



Click 1: Click on Password field



Click 2: Click Log In



Click 3: Click Submit (Auth page)

PG&E Share My Data

[Primary 3rd Party name] & [Secondary 3rd Party name] request data access and actions as follows:

- Basic
- Usage
- Meter Reprogram
- Billing
- Program
- PDP Disenroll
- Account
- Enrollment

Select all Service IDs for all Accounts 5

Account3: 2469083719-Normal
▶ Show details

ALVAREZ, JANICE ANN
Account #: 3394979277

▶ Show data sharing and Service ID details

Access duration: Indefinite
Includes data required by Rule 24, and up to [X] months of historical data prior to today's date.

Terms and Conditions: by submitting I agree to the [Terms and Conditions](#).

[Cancel](#) **SUBMIT**

© Pacific Gas and Electric Company
[Privacy >](#)

600px
667px iPhone



Product & Platform Changes

Customer Authorizations

- Expanded view of data elements & actions

Share My Data

[Primary 3rd Party name] & [Secondary 3rd Party name] request data access and actions as follows:

- Basic
- Billing
- Account
- Usage
- Program Enrollment
- Meter Reprogram
- PDP Disenroll

Quickly authorize access to your data and allow necessary changes to your services as described in the details below.

Basic Information..

Includes name and service address...

Billing Information

Includes billing records, billing history, billing and meter read dates, rate schedule, and voltage class

Account Information

Includes account number(s), service agreement number(s), service start date, and past delinquency

Usage Information

Includes Electric and/or Gas usage data used for bill calculations, interval usage, and interval time-of-use indicators

Program Enrollment

Includes PG&E DR program name/status and CAISO information

Meter Reprogram

Electric meters being authorized may need reprogramming to record energy usage more precisely

PDP Disenroll

Service agreements that you authorize need to be disenrolled from the Peak Day Pricing program (if applicable)

Shared Accounts and Service IDs

ERROR: Select at least one Service ID to proceed.

Select All Service IDs for All Accounts

Account3: 2469083719-Normal
[▶ Show details](#)

ALVAREZ, JANICE ANN
Account #: 3394979277

Address: 4324 BERKSHIRE RD, BAKERSFIELD, 93313
Service ID: 3394979650
UUID: 9757120780
Service Type: Electric

Address: 4324 BERKSHIRE RD, BAKERSFIELD, 93313
Service ID: 3394979650
UUID: 9757120780
Service Type: Electric

[▼ Hide details](#)

[▶ Hide data sharing and Service ID details](#)

Access duration: Indefinite
Includes data required by Rule 24, and up to [X] months of historical data prior to today's date.

Terms and Conditions: by submitting I agree to the [Terms and Conditions](#).

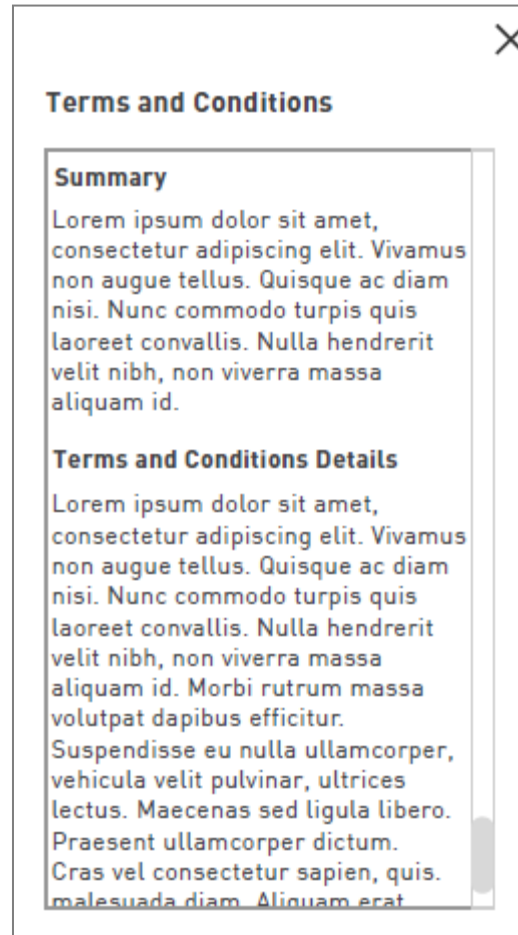
[Cancel](#) SUBMIT



Product & Platform Changes

Customer Authorizations

- **Terms & Conditions**
 - Full set
- **Rendered as an overlay**
 - Doesn't take user to different page





Product & Platform Changes

Third Party Portal

- Ability to cancel authorizations
 - Manually via portal
 - Programmatically via API

The screenshot displays the PG&E Share My Data Third Party Portal interface. At the top, there is a blue header with the PG&E logo on the left, the text "Share My Data Third Party Portal" in the center, and a "Green Button Connect My Data" logo on the right. Below the header, there are two navigation links: "Manage Registration" and "Manage Authorizations". The main content area is titled "View Authorization" and contains three sections:

- Authorization:** This section shows the "Subscription ID: 42ab323sd" and a "Cancel Authorization" button. Below this, it lists "Company Name(s): [Primary Company Name] & [Secondary Company Name]" and "Customer Information: Basic, Billing, Account, Usage, Program Enrollment, Meter Reprogram, PDP Disenroll".
- Authorized Date Range:** This section shows "Historical Usage Access: Last 24 Months", "Start Date: 04/13/2017", and "End Date: Indefinitely". A circled number "3" with an arrow points to the "Start Date" field.
- Authorized Service Agreements:** This section shows a table of service agreements for "Account UUID: 34571".

Service Agreements	Data Type
SA UUID: 23452	Electric
SA UUID: 23453	Electric
SA UUID: 23454	Electric
SA UUID: 23455	Electric



Product & Platform Changes

Phase 1 Rule 24 Data Elements

Account ID	Service meter number (if any)
PG&E Unique Identifier (UUID)	Meter Type
Service ID	(Current) Meter Read Cycle
Service Start Date	Sublap
Account name	Pricing Node (Pnode)
Service address	(Current) Standby Rate Option if On-Site Generation Indicator
(Historical Billed) Service tariff (D--TOU)	(default Interval) Duration (length in seconds)
(Historical Billed) Service voltage (if relevant)	DR Program Name
(Historical Billed) Meter Read Cycle	Earliest Termination Date from UDC DR Program without Financial Obligation
(Historical Billed) Standby Rate Option if On-Site Generation Indicator	Earliest Termination Date from UDC DR Program regardless of Financial Obligation
Bill start date	DR Program Status
Bill end date	DR Program Enrollment Date
Bill total charges (\$)	DR Program De-Enrollment Date
Name (Over Baseline 1%--30%)	LSE
Volume (1234.2)	MDMA
Name (TOU Breakdown)	MSP
Volume (TOU e.g. 1234.2)	Contact Information for LSE, MDMA, MSP
Name (Demand Breakdown)	(Interval Usg) Start
Volume (Demand e.g. 1234.2)	(Interval Usg) Volume (1234.2)
Currency of bill total costs	Unit (kWh)
# of Service meters (This data element can be derived by 3Ps counting # of meters)	Default Data Quality (if not specified in IntervalReading/ReadingQuality)
Account address	Energy Direction
SA Status	Power of Ten Multiplier (for interval usage values)
(Current) Service tariff (D--TOU)	Interval Length (of Usage Reading)
(Current) Service voltage (electric only) and Commodity	Electric Interval TOU Indicators
	Commodity
	Local Time Parameters (DST details)
	Power of Ten Multiplier (for Billed Demand by TOU and Season / TOU Usage by Season / Tiered Usage)
	Power of Ten Multiplier (for Billed total usage)
	Bill total kWh



Product & Platform Changes

Phase 1 Rule 24 Data Elements by Group

Grouping	Data Elements
Account	Account ID
Account	PG&E Unique Identifier (UUID)
Account	Service ID
Account	Service Start Date
Basic	Account name
Basic	Service address
Billing	(Historical Billed) Service tariff (D--TOU)
Billing	(Historical Billed) Service voltage (if relevant)
Billing	(Historical Billed) Meter Read Cycle
Billing	(Historical Billed) Standby Rate Option if On-Site Generation Indicator
Billing	Bill start date
Billing	Bill end date
Billing	Bill total charges (\$)
Billing	Name (Over Baseline 1%--30%)
Billing	Volume (1234.2)
Billing	Name (TOU Breakdown)
Billing	Volume (TOU e.g. 1234.2)
Billing	Name (Demand Breakdown)
Billing	Volume (Demand e.g. 1234.2)
Billing	Currency of bill total costs
N/A	# of Service meters (This data element can be derived by 3Ps counting # of meters)



Product & Platform Changes

Phase 1 Rule 24 Data Elements by Group

ProgramEnrollmentInfo	Account address
ProgramEnrollmentInfo	SA Status
ProgramEnrollmentInfo	(Current) Service tariff (D--TOU)
ProgramEnrollmentInfo	(Current) Service voltage (electric only) and Commodity
ProgramEnrollmentInfo	Service meter number (if any)
ProgramEnrollmentInfo	Meter Type
ProgramEnrollmentInfo	(Current) Meter Read Cycle
ProgramEnrollmentInfo	Sublap
ProgramEnrollmentInfo	Pricing Node (Pnode)
ProgramEnrollmentInfo	(Current) Standby Rate Option if On-Site Generation Indicator
ProgramEnrollmentInfo	(default Interval) Duration (length in seconds)
ProgramEnrollmentInfo	DR Program Name
ProgramEnrollmentInfo	Earliest Termination Date from UDC DR Program without Financial Obligation
ProgramEnrollmentInfo	Earliest Termination Date from UDC DR Program regardless of Financial Obligation
ProgramEnrollmentInfo	DR Program Status
ProgramEnrollmentInfo	DR Program Enrollment Date
ProgramEnrollmentInfo	DR Program De-Enrollment Date
ProgramEnrollmentInfo	LSE



Product & Platform Changes

Phase 1 Rule 24 Data Elements by Group

ProgramEnrollmentInfo	MDMA
ProgramEnrollmentInfo	MSP
ProgramEnrollmentInfo	Contact Information for LSE, MDMA, MSP
Usage	(Interval Usg) Start
Usage	(Interval Usg) Volume (1234.2)
Usage	Unit (kWh)
Usage	Default Data Quality (if not specified in IntervalReading/ReadingQuality)
Usage	Energy Direction
Usage	Power of Ten Multiplier (for interval usage values)
Usage	Interval Length (of Usage Reading)
Usage	Electric Interval TOU Indicators
Usage & Billing	Commodity
Usage & Billing	Local Time Parameters (DST details)
Usage & Billing	Power of Ten Multiplier (for Billed Demand by TOU and Season / TOU Usage by Season / Tiered Usage)
Usage & Billing	Power of Ten Multiplier (for Billed total usage)
Usage or Billing (either)	Bill total kWh



Rule 24 Process and Functional Changes

- **Customers can authorize R24 data sharing using three methods:**
 1. CISR-DRP form submitted to R24 team using ESFT
 - DRPs can request all R24 data elements at the subscription level
 2. Online via a Third-Party DRP's website
 3. Online via the customer's PG&E "Your Account"

- **All Phase 1 R24 data elements will be made available via SMD APIs**
 - Includes data for new customer authorizations and changes to data elements for existing customer authorizations
 - Flat file data delivery via ESFT service will be discontinued



R24 Authorization Pathways and Lifecycle Management Options

Origin of Rule 24 Authorization	Creating New Auths	Cancelling Auths	Updating Auths
<ol style="list-style-type: none"> 3P's Website Customer's online PG&E account ("Your Account") 	<p>Customers can authorize starting from a DRP's website.</p> <p>Can also authorize via the customer's online PG&E "Your Account" (via the Share My Data/SMD link).</p>	<p>Customers can cancel auths (i) starting from a DRP's website or (ii) via the customer's online PG&E "Your Account" or (iii) submitting a CISR-DRP form.</p> <p>DRPs can cancel using (i) SMD API; (ii) 3P Portal/Manage authorization; or (iii) submitting a CISR-DRP form to R24 team.</p>	<p>For authorization durations that are not Indefinite, customers can extend duration for 2 yrs using online PG&E "Your Account". Customer can also remove previously authorized SAs. Customers can authorize additional SAs by cancelling existing authorizations and then creating a new authorization.</p> <p>DRPs cannot update authorizations.</p> <p>Customers can update an online authorization timeframe using the CISR-DRP Form (either Version 1 or 2)</p>
<p>New CISR-DRP Form (Version 2) submitted to R24 team</p>	<p>DRP submits CISR-DRP form to Rule 24 team using the DRP's ESFT folder.</p>	<p>Customers can revoke only by submitting a new CISR-DRP form (cannot cancel via online PG&E "Your Account").</p> <p>DRPs can cancel using (i) SMD API; (ii) 3P Portal/Manage authorization; or (iii) submitting a CISR-DRP form to R24 team.</p>	<p>Customers can update authorization timeframe only by submitting new CISR-DRP forms.</p> <p>DRP cannot update authorizations.</p>
<p>Existing CISR-DRP form (Version 1) migrated to Click Through</p>	<p>Version 1 of the CISR-DRP form will be accepted for a two-month transition period, after which time new authorizations can only be submitted using Version 2 of CISR-DRP form</p>	<p>Customer can revoke only by submitting a CISR-DRP form to R24 team (cannot cancel via online PG&E "Your Account").</p> <p>DRPs can cancel using (i) SMD API; (ii) 3P Portal/Manage authorization; or (iii) submitting a CISR-DRP form to R24 team.</p>	<p>Customers can update authorization timeframe only by submitting new CISR-DRP forms.</p> <p>DRP cannot update authorizations.</p>