

Entity Level 1
Entity Level 2
Entity Level 3
Entity Level 4
Lowest level granularity

Customer Resource Model (PII/Customer Info)

SMD Phase	ESPI Element Name	Electric / Gas	ESPI Element Description	PG&E Details	Data Element	Required Authorization	APIs
Ph 2	RetailCustomer	Both	Root Node	Root Node (for representing customer identifying information)	[Container] Authorization of PII info	Any of the following: Basic Info Account Info	See Below
Ph 2	Customer	Both	(container)		[Container] Customer details		
Ph 2	name	Both	identifier of object instance.	Billable customer name (e.g. John Doe)	Account name (ACME INC. or JOE SMITH)	Any of the following: Basic Info	1) ./espi/1_1/resource/Batch/BulkRetailCustomerInfo/BulkID/CorrelationID [i.e. daily subscriptions] 2) ./espi/1_1/resource/Batch/BulkRetailCustomerInfo/BulkID 3) ./espi/1_1/resource/Batch/RetailCustomer/RetailCustomerID
Ph 2	CustomerAccount	Both	(container) Assignment of a group of products and services purchased by the customer through a customer agreement, used as a mechanism for customer billing and payment. It contains common information from the various types of customer agreements to create billings (invoices) for a customer and receive payment.	Captures PG&E Account ID	[Container] Account Details	Any of the following: Account Info	1) ./espi/1_1/resource/Batch/BulkRetailCustomerInfo/BulkID/CorrelationID --> daily subscription job 2) ./espi/1_1/resource/Batch/BulkRetailCustomerInfo/BulkID 3) ./espi/1_1/resource/Batch/RetailCustomer/RetailCustomerID
Ph 2	name	Both	identifier of object instance.	Account ID (e.g. 1234567890)	Account ID		
Ph 2	notifications	Both	Set of customer account notifications.	As of Jan 2016, these elements can only be authorized for sharing with Energy Efficiency Finance (EEF) 3rd parties for providing the last 12 months of 24-hr and 48-hr delinquency notifications.	See details		
Ph 2	methodKind	Both	enumeration of kind of notification (e.g. call, email, letter, other etc.)	For delinquency notifications; will default to 'other' always.	See details		
Ph 2	time	Both	timestamp of notification	For delinquency notifications; will always be simply the date as represented by midnight of the notification date.	See details	Any of the following: Account Information [As of Jan 2016, these elements can only be authorized for sharing with Energy Efficiency Finance (EEF) 3rd parties for providing the last 12 months of 24-hr and 48-hr delinquency notifications.]	1) ./espi/1_1/resource/Batch/BulkRetailCustomerInfo/BulkID/CorrelationID --> daily subscription job 2) ./espi/1_1/resource/Batch/BulkRetailCustomerInfo/BulkID 3) ./espi/1_1/resource/Batch/RetailCustomer/RetailCustomerID
Ph 2	note	Both	annotation of the reason for the notification	Example (24-hour and 48-hour) delinquency notifications: 3rd Party 48 Hour LTR BPP 48 Hr Delinq Ntc Combined Res 48 Hr Delinq Ntc Combined RES 48HR BPP Delinq Ntc Residential 48 Hr Delinq Ntc Res UDC ESP Chrg Past Due 48Hr Combined Res 2nd 48 Hr Ntc Residential 2nd 48 Hr Ntc BPP 24 Hr Delinq Ntc Combined CIA 24 Hr Delinq Ntc Combined CIA 24 Hr BPP Delinq Ntc CIA 24 Hr Delinq Ntc CIA UDC ESP Chrg Past Due 24Hr	See details		
Ph 2	customerNotificationKind	Both	delinquency...	delinquency	See details		
Ph 2	CustomerAgreement	Both	Container	Captures PG&E Service Agreement ID	[Container] Service Agreement Details		
Ph 2	name	Both	identifier of object instance.	Service Agreement ID (9876543210)	Service ID (3-xxx...)	Any of the following: Account Info	1) ./espi/1_1/resource/Batch/BulkRetailCustomerInfo/BulkID/CorrelationID --> daily subscription job 2) ./espi/1_1/resource/Batch/BulkRetailCustomerInfo/BulkID 3) ./espi/1_1/resource/Batch/RetailCustomer/RetailCustomerID
Ph 2	signDate	Both	Date this agreement was consummated among associated persons and/or organisations	Service Start Date (e.g. 978336000 i.e. 1/1/2001 in epoch seconds)	Service Start Date		
Ph 2	ServiceLocation	Both	(Container)	Root Node. Corresponds to address of service location			
Ph 2	MainAddress	Both	captures premise address of meter				
Ph 2	streetDetail	Both	Street detail.				
Ph 2	addressGeneral	Both	Additional address information, for example a mailstop.	Address Line 1 (e.g. 77 Beale St., Suite 100)	Service address (123 MAIN ST #100...)	Basic Info	1) ./espi/1_1/resource/Batch/BulkRetailCustomerInfo/BulkID/CorrelationID --> daily subscription job 2) ./espi/1_1/resource/Batch/BulkRetailCustomerInfo/BulkID 3) ./espi/1_1/resource/Batch/RetailCustomer/RetailCustomerID
Ph 2	addressGeneral2	Both	(if applicable) Second line of a free form address.	Only populated as applicable (often blank)			
Ph 2	townDetail	Both	Town detail.				
Ph 2	name	Both	Town name.	Town/City (e.g. San Francisco)			
Ph 2	stateOrProvince	Both	Name of the state or province.	State (i.e. CA)			
Ph 2	code	Both	Town code	Zip code (e.g. 94105)			