

BEFORE THE PUBLIC UTILITIES COMMISSION  
OF THE STATE OF CALIFORNIA



**FILED**

09/07/23

04:59 PM

A1811015

Application of Pacific Gas and Electric  
Company for Approval of Its Proposals and  
Cost Recovery for Improvements to the Click-  
Through Authorization Process Pursuant to  
Ordering Paragraph 29 of Resolution E-4868.  
(U39E)

A.18-11-015

And Related Matters

A.18-11-016

A.18-11-017

**COMMENTS OF OHMCONNECT, INC. ON PROPOSED DECISION APPROVING  
CLICK-THROUGH ENHANCEMENT APPLICATIONS**

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September 7, 2023

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**COMMENTS OF OHMCONNECT, INC. ON PROPOSED DECISION APPROVING  
CLICK-THROUGH ENHANCEMENT APPLICATIONS**

Pursuant to Rule 14.3 of the California Public Utilities Commission’s (“Commission”) Rules of Practice and Procedure, OhmConnect, Inc. (“OhmConnect”) respectfully submits these opening comments on the *Proposed Decision Approving Click-Through Enhancement Applications* (“Proposed Decision”) issued on August 18, 2023, in the above-captioned proceeding.

**I. INTRODUCTION**

Third-party demand response can be a powerful tool to mitigate the impact of extreme weather events on the electrical grid. However, third party demand response providers (“DRPs”) face significant impediments to their customer growth and to providing existing customers with a positive customer experience due to complications with the click-through authorization process and related issues that are completely outside of the DRPs’ control.

The investor owned utilities (“IOUs”) act as the Meter Data Management Agents (“MDMAs”) and are the exclusive providers of customer smart meter data. However, several aspects of the IOUs’ performance in managing click-through and data delivery processes would

be wholly unacceptable in a competitive marketplace. *Less than 50% of eligible customers who initiate enrollment in a third party DR program successfully complete the authorization process.*<sup>1</sup> Thousands of customers who enter the click-through process do not complete it.<sup>2</sup> And for those customers who do successfully authorize data sharing through the click-through process, many still suffer significant and unpredictable instances of missing, incorrect, and/or delayed data. The volume of data issues, the impact of outages, and the general slow response times to fix these issues are all proof that the IOUs fail to provide adequate MDMA services.

This proceeding is meant to help fix these issues. Yet, it has dragged on for nearly five years and the IOUs' proposed "improvements" fail to address the root challenges that the DRPs face. The Commission should heed intervenors' recommendations that will improve the click-through process and achieve the goals and meet the requirements the Commission created in Ordering Paragraph 29 of Resolution E-4868.

Instead, the Proposed Decision makes a number of errors that must be addressed. *First*, while the Proposed Decision correctly recognizes that customers should be able to disenroll from conflicting IOU-administered programs during the click-through process, the Proposed Decision's solution will instead create further unnecessary hurdles for customers. Customers should be able to disenroll from conflicting programs and complete the click-through data authorization process online and in a single session.

*Second*, the Proposed Decision incorrectly finds that the development of a Service Level Agreement ("SLA") and the creation of IOU-branded login buttons are outside the scope of this proceeding. SLAs are an industry standard that are necessary to ensure customers receive a

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<sup>1</sup> Ex. OHM-0601(Prepared Testimony of OhmConnect) at 10.

<sup>2</sup> See PG&E "Performance Metrics for Electric Rule 24", available at [https://www.pge.com/en\\_US/for-our-business-partners/performance-metrics/performance-metrics.page](https://www.pge.com/en_US/for-our-business-partners/performance-metrics/performance-metrics.page); see also SCE "Performance Metrics - last 30 days", available at <https://www.sce.com/PerformanceMetrics>.

minimum level of service. Branded login buttons are a common practice to assure customers of the validity of the click-through process. Both of these issues are clearly within the scope of this proceeding and the Commission can and should adopt both proposals to materially improve the click-through process that is the focus of this proceeding.

*Third*, while the Proposed Decision correctly orders the IOUs to communicate about unplanned outages as soon as possible, it allows them a 24-hour window to do so. This length of delay in reporting is unwarranted. IOUs can and should communicate unplanned outages within 60 minutes.

*Finally*, the Proposed Decision declines to order IOUs to provide DRPs with standardized information about why customers fail to complete data sharing authorizations on misplaced privacy grounds. The provision of the error codes does not infringe on customer privacy.

## **II. RECOMMENDED CHANGES TO THE PROPOSED DECISION**

### **A. The Proposed Decision Recognizes Enrollment Conflicts Should Be Resolved Within the Click-Through Process, But the Proposed Process Can Be Refined Further (Section 8.4)**

Disenrolling from a program often proves to be an unexpectedly frustrating experience for many individuals. The current process is convoluted and locating disenrollment instructions can make it difficult to navigate. These factors contribute to a sense of powerlessness and irritation, causing a customer to abandon the disenrollment process, leaving them trapped in a program they no longer wish to be a part of. This is directly contrary to the Commission's DR principle that states: "Demand response customers shall have the right to provide demand response through a service provider of their choice and Utilities shall support their choice by eliminating barriers to

data access.”<sup>3</sup> The decision in this proceeding has the power to remove these barriers and improve their overall experience with demand response programs.

The Proposed Decision correctly accepts OhmConnect’s premise that customers should be able to “resolve enrollment conflicts” with IOU-administered DR programs while seeking to enroll in a third-party DRP-administered program.<sup>4</sup> However, the disenrollment process established in the Proposed Decision erects additional unnecessary hurdles that makes resolution of enrollment conflicts *more* difficult for customers to navigate than the status quo and will lead to “enrollment fatigue” and customer attrition.<sup>5</sup> The Commission should refine the disenrollment process further to allow for both completion of the click-through data authorization process and disenrollment from a conflicting program in a single online session.

Scenario 1 (No Waiting Period Before Enrollment) can be further automated and streamlined to create a seamless disenrollment process for customers. The current proposal in the Proposed Decision will make disenrollment so onerous and disjointed that many customers will abandon the process. First and foremost, the customer should be able to disenroll from a conflicting program online with the click of a button and without leaving the website prior to completion of the click-through and authentication process—no antiquated and onerous phone disenrollment process is necessary.

At this stage of the process, the IOU has *already* authenticated the customer. Thus, there are no additional statutory mandates, privacy concerns, or authentication requirements that necessitate disenrollment via phone. Halting the online click-through process by requiring

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<sup>3</sup> Decision (“D.”) 16-09-056, at 97 (Ordering Paragraph 8).

<sup>4</sup> Proposed Decision at 40-41.

<sup>5</sup> In the Rule 24/32 implementation proceeding (a precursor to this click-through proceeding), D.16-06-008 identified “enrollment fatigue” as a problem to be addressed and ordered parties to “attempt to identify unnecessary steps in the enrollment process and determine options to eliminate these steps.” D.16-06-008 at 23; *see also id.* at 30 (Finding of Fact 22, 23, and 25).

customers to disenroll over the phone, only to have them return to the website to authorize the release of the customer data *a second time*, is an unnecessarily complex process that few customers will take the time to complete. The proposed process is also inconsistent with other disenrollment processes currently in place, such as for termination of IOU service, which can be completed entirely online. All of the steps proposed in the Proposed Decision can be automated and streamlined to create a simple disenrollment process that can be completed by the customer in one online session. Specifically, the Scenario 1 process should be modified as follows:

- a. Notify the customer that they are already enrolled in an IOU-administered program and identify the program.
- b. Inform the customer that CPUC rules prohibit dual enrollment in DR programs and that they must disenroll from the utility's DR program if they wish to enroll in the third-party DRP program.
- c. Present the customer with the options to either (a) disenroll from the IOU-administered program, or (b) remain in the IOU-administered program.
- d. The customer's selection of the "disenroll" button will complete the disenrollment and data authorization process.<sup>6</sup>

The process for Scenario 2 (Waiting Period Before Enrollment) should be the same as for Scenario 1, except that the pop-up window should inform the customer of the number of days that they must remain in the IOU-administered program and the date on which they will be disenrolled and switched to the third-party DRP program. Preventing customers from finalizing the click-through process after having already registered with the DRP and authenticated themselves to the IOU is a sure-fire way to disincentivize these customers from going through the process a second

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<sup>6</sup> When the customer selects to "unenroll" online, the system could initiate a disenrollment request email message within the IOU's system that is automatically routed to the appropriate program's administration email. Alternatively, the system could generate an internal email that goes to a single email address and utility personnel could then route the email to the proper program administration authority. Since the customer already verified their identity as part of the authentication process, the integrity and validity of the disenrollment request is verified. This simplistic approach addresses the differences between the various DR programs and is customer friendly.



time at a later date once the conflicting program's enrollment period is over. Again, there is no statutory mandate, privacy concern, or authentication requirement that would prohibit the customer from authorizing *both* the disenrollment and data authorization simultaneously on the website, even if those authorizations will not be implemented until after the conflicting program's enrollment period is over. The Scenario 2 process should be modified as follows:

- a. Notify the customer that they are already enrolled in an IOU-administered program and identify the program.
- b. Inform the customer that CPUC rules prohibit dual enrollment in DR programs and that they must disenroll from the utility's DR program if they wish to enroll in the third-party DRP program.
- c. Inform the customer that program rules require them to remain in the IOU-administered program for a specified number of days. Inform them that, if they choose to disenroll, the disenrollment will not go into effect until a specified date.
- d. Present the customer with the options to either (a) disenroll from the IOU-administered program, or (b) remain in the IOU-administered program.
- e. The customer's selection of the "disenroll" button will complete the disenrollment and data authorization process. The disenrollment will go into effect at the end of the enrollment period for the current IOU-administered program.<sup>7</sup>

The Proposed Decision determines that no party proposed a fully effective approach to overcome the difficulty in resolving enrollment conflicts given the handful of differences that exist between the DR programs that each utility offers.<sup>8</sup> However, the existing evidentiary record does suggest the Commission could adopt any number of simple and customer-friendly approaches that address the differences between the various DR programs. For example, the above processes could be achieved by initiating an email message with a disenrollment request that is automatically

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<sup>7</sup> As for Scenario 1, when the customer selects to "unenroll" online, the system could initiate a disenrollment request email message within the IOU's system that is automatically routed to the appropriate program's administration email. Alternatively, the system could generate an internal email that goes to a single email address and utility personnel could then route the email to the proper program administration authority. The disenrollment request could be logged and automatically initiated when the required enrollment term has elapsed.

<sup>8</sup> Proposed Decision at 40.

routed to the appropriate program's administration email. Alternatively, the system could generate an internal email that goes to a single email address and utility personnel could then route the email to the proper program administrator. For programs with a minimum enrollment period, the disenrollment request could be logged and automatically initiated when the required term has elapsed. Finally, the Commission could also empower customers with the ability to authorize third-party DRPs to assist them with the disenrollment process by revising the existing authorization forms<sup>9</sup> to include a checkbox that would authorize the DRP to assist the customer with disenrolling from an IOU program.

Should the above streamlined solutions not be adopted in the Final Decision, several changes must be made to the pop-up window language and information provided to customers. First, the disenrollment process should not place the burden of finding the appropriate contact information on the customer. Automatically providing customers the appropriate phone number and email address for disenrolling from their respective program is straightforward and must be included in the basic requirements. Second, the customer should not have to return to complete the authorization process a second time, as this step has already been completed. Third, the fact that a customer is enrolled in a DR program does not preclude them from sharing their data with another third party. There can be multiple valid data sharing authorizations with third parties, however only one can enroll them in CAISO DRRS. Lastly, it is important to note that phone disenrollment does not get a confirmation in most cases; provision of a confirmation that disenrollment has been completed should be a requirement.

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<sup>9</sup> *E.g.*, PG&E Form 79-1095, *available at*: <https://www.pge.com/includes/docs/pdfs/mybusiness/energysavingsrebates/demandresponse/howtoapply/E79-1095%20-Third%20Party%20Authorization.pdf>.

When customers encounter barriers that limit their ability to join the service provider of their choosing, this runs afoul of the Commission’s vision for demand response.<sup>10</sup> The Proposed Decision should be modified to create a streamlined disenrollment and data authorization process in a single online session, to remove unnecessary barriers to customer choice.

**B. Establishing a Service Level Agreement and Requiring IOUs to Allow Third-Party DRPs to Use Their Logos in the Click-Through Process is Within the Scope of This Proceeding (Section 8.1)**

The Proposed Decision incorrectly determines “[e]stablishing an SLA goes well beyond the [click-through process (“CTP”)] and warrants a broader discussion than is scoped into this proceeding. Therefore, requiring the IOUs to implement an SLA is deemed not within the scope of this proceeding and this decision will not address the argument on its merits.”<sup>11</sup> The Proposed Decision also incorrectly finds that “[w]hether or not the IOUs should be required to allow third-party DRPs to use their logos in the CTP is not within the scope of this proceeding.”<sup>12</sup>

In the consolidated Applications, the IOUs request cost recovery for proposed improvements to the click-through process. The October 23, 2020 Scoping Memo and Ruling asks whether the IOUs’ applications are “just and reasonable.”<sup>13</sup> The answer is a resounding “no.” The “improvements” proposed by the IOUs fail to address the root challenges that DRPs face and fail to improve the click-through authorization and data delivery processes. Intervenors in this proceeding have provided ample evidence that the Applicants do not meet their burden of proof.<sup>14</sup> The Commission must not allow the IOUs’ unwillingness to raise their standards with respect to their click-through authorization processes lead to ratepayer harm and harm the public interest in

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<sup>10</sup> D.16-09-056 at 97 (Ordering Paragraph 8).

<sup>11</sup> Proposed Decision at 37.

<sup>12</sup> *Id.* at 38.

<sup>13</sup> October 23, 2020 Scoping Memo at 5.

<sup>14</sup> OhmConnect Reply Brief at 10-13 (June 18, 2021).

expanding third-party demand response. Based on the record in this proceeding, the Commission can and should adopt other party proposals that will actually deliver improvements to the click-through process. In other words, considering proposals that improve the click-through process are clearly within the scope of this proceeding.

The reasonableness of the IOU proposals cannot be considered in a vacuum—the Commission should consider standard industry practices. The Commission has stated that California regulated utilities must keep “pace with current conditions and today’s prevailing standards.”<sup>15</sup> Moreover, the Commission regularly adopts and revises existing service quality measures and other standards applicable to regulated utilities to reflect current technological and business conditions.<sup>16</sup>

As done elsewhere in this Proposed Decision, the Commission should also consider the recommendations of other parties to the proceeding. The Commission is specifically authorized by statute to “supervise and regulate every public utility in the State” and may “*do all things, whether specially designated in [this part] or in addition thereto, which are necessary and convenient in the exercise of its jurisdiction.*”<sup>17</sup> Where the IOUs’ proposals fall short, or where other parties’ proposals are a better fit to further the Commission’s objectives, the Commission has the prerogative to impose its own solution.

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<sup>15</sup> See *Order Instituting Rulemaking 02-12-004*, initiating a proceeding “to adopt revisions to existing service quality measures and standards applicable to telecommunications carriers reflecting current technological and business conditions.” R.02-12-004 at 1.

<sup>16</sup> The Commission has adopted national standards for the IOUs’ annual reliability reporting and holds regulated entities to accepted industry standards in various general orders pertaining to construction, operation, and maintenance. See D.16-01-008 at 4, which adopted the Institute of Electrical and Electronics Engineers (IEEE) 1366-2003 reliability standards; see also General Order 95 and General Order 167-B.

<sup>17</sup> *San Diego Gas & Elec. Co. v. Superior Court*, 13 Cal.4th 893, 914-15 (1996), quoting Pub. Util Code § 701.

There is adequate evidence in the record for the Commission to require a SLA between the IOUs, acting as Meter Data Management Agents (“MDMAs”), and the third-party DRPs. The haphazard and inconsistent way that each IOU has developed its MDMA systems has burdened DRPs with additional costs due to market uncertainty, relatively high downtimes for all three IOUs, and particularly poor data delivery service from SCE. Resolution E-4868 requires that the IOUs address “upgrades to the information technology infrastructure needed for click-through authorization processes.”<sup>18</sup> An SLA is an industry standard for IT systems.<sup>19</sup> Claims of MDMA platform complexity should not excuse the applicability of an SLA. There are multiple examples of MDMAs existing today that have developed an SLA, such as Smart Meter Texas and Dayton Power and Light Company.<sup>20</sup> The three IOUs can be held, at a minimum, to at least *some* standard of expected service. Absent service-level expectations, it is impossible for the Commission to judge the “improvements in data delivery processes” as required by Resolution E-4868.

There is also adequate evidence in the record for the Commission to determine that a click-through button with a utility logo is common practice and would increase customer confidence. Typical click-through solutions include a branded login button provided by the click-through implementer that the third-party is encouraged to incorporate on its website. Google, Microsoft, and Apple (and countless others) have all developed a login or sign-in button that incorporates that entity’s logo, as shown in **Figure 1** below.<sup>21</sup>

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<sup>18</sup> See Resolution E-4868 at 105-106 (Ordering Paragraph 29).

<sup>19</sup> Ex. OHM-0601 at 7; OhmConnect Opening Brief at 7.

<sup>20</sup> OhmConnect Opening Brief at 10, *citing* January 29, 2018 “Joint Motion to Admit Stipulation, Affidavit of Notice, and Supporting Testimony Into Evidence,” Attachment 1, available at <https://interchange.puc.texas.gov/search/documents/?controlNumber=47472&itemNumber=100>; and October 23, 2020 “Stipulation and Recommendation” between The Dayton Power and Light Company and Signatory Parties, available at <https://dis.puc.state.oh.us/DocumentRecord.aspx?DocID=a67df48e-b382-44b6-b8e6-c4836002a024>

<sup>21</sup> Ex. OHM-0601 at 15.

**Figure 1.**



Using the utility logo on the button that redirects customers to the IOU’s click-through authorization process establishes that this is the proper and secure way to authorize a DRP data access, alleviating customer security concerns or confusion.

Ordering the implementation of common sense, industry-standard practices – rather than approving cost recovery for inadequate proposals that do nothing to fix the deeply flawed click-through process – is well within the scope of this proceeding. The Proposed Decision should be modified to (1) direct stakeholders to develop an SLA to establish clear performance expectations for the IOUs,<sup>22</sup> and (2) direct IOUs to develop consistent login buttons that DRPs can use on their websites to direct customers to the click-through authorization process with confidence.

**C. IOUs Should Be Required to Communicate About CTP Outages Within 60 Minutes (Section 8.3)**

The Proposed Decision correctly “directs the IOUs to clearly communicate on their respective existing Rule 24/32 metrics websites all CTP outages, whether planned or unplanned.”<sup>23</sup> The Proposed Decision also appropriate requires that planned outages “must be communicated on the IOU’s website as soon as the planned outage date(s) and time(s) are known” and that unplanned outages “must be communicated on the IOU’s CTP/Rule 24/32 website in as close to real-time as

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<sup>22</sup> See Sample SLA in Exhibit MD-0501.

<sup>23</sup> Proposed Decision at 39.

possible.”<sup>24</sup> However, allowing IOUs to wait up to “24 hours from the commencement of the unplanned outage” is an unreasonable time frame.

Unplanned outages can and should be communicated in no more than 60 minutes after their commencement. There are numerous examples of other information that the IOUs communicate automatically or near instantaneously that show that the IOUs are more than capable of communicating this basic information about unplanned outages within 60 minutes. For example, OhmConnect receives the basic customer information necessary for the Demand Response Registration System within about 90 seconds from when a customer completes the click-through process.

**D. Providing Third-Party DRPs with Granular Information About Why Customers Fail to Complete Data Sharing Authorizations Will not Infringe on Customer Privacy (Section 8.5)**

The Proposed Decision “declines to require the IOUs to provide notifications on why customers fail to complete data sharing authorizations” out of a misguided intent to “protect the privacy of customers.”<sup>25</sup> There is nothing sensitive about information regarding what stage in the processes customers abandoned completion of their data sharing authorization. In fact, the IOUs already provide some error codes to the DRPs, but the codes vary widely from utility to utility. PG&E’s existing error codes cover nearly all of the above nine cases proposed by OhmConnect.<sup>26</sup> The Commission should direct the IOUs to provide DRPs with information about the cause of a customer’s failure to complete the click-through authorization process by using a *standardized* set of error codes and industry-standard methodology like pixel tracking.<sup>27</sup>

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<sup>24</sup> *Id.*

<sup>25</sup> Proposed Decision at 42.

<sup>26</sup> OhmConnect Opening Brief at 20.

<sup>27</sup> Pixel tracking is when a very small image not visible to the user is embedded into a webpage that allows a site administrator to understand a visitor’s navigation behavior to improve the user experience.

The error codes OhmConnect requested do not infringe on customer privacy. Upon initiating the click-through process on the DRP's website, the customer has *already* consented to providing – and then proceed to provide – their name, zip code, phone number, and email address when they sign up with the party DRP. By providing error code data, the IOU will not be sharing any additional sensitive information with the third party DRP. The error code data does not constitute “electrical or gas consumption data.”<sup>28</sup> The error code data does not constitute “personnel, medical, or similar files, the disclosure of which would constitute an unwarranted invasion of personal privacy.”<sup>29</sup>

Customers begin the click-through process by registering on the DRP's website. However, because the customer is then redirected to the IOU's website to complete authentication and authorization, once the customer leaves the DRP's site, the DRP loses all visibility as to what prevents the customer from completing the process for enrollment. The scope of the problem is stark: by OhmConnect's estimation, less than 50% of eligible customers that initiate enrollment in a DRP program complete the authorization process.<sup>30</sup> The set of codes that the DRPs do receive from the utilities varies widely from utility to utility. By not providing consistent error code information to DRPs, the IOUs erect unnecessary barriers to DRPs and the Commission understanding why customers are failing to complete the click-through process and limiting the ability of DRPs that wish to follow up with prospective customers. As such, we request that the Commission require all of the IOUs file a Tier 2 Advice Letter with a standardized set of error codes within 90 days of Final Order adoption to provide the Commission and third-party DRPs

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<sup>28</sup> Pub. Util. Code § 8380.

<sup>29</sup> Gov. Code § 7927.700.

<sup>30</sup> Ex. OHM-0601 at 10.



with the information needed to ensure success for interested customers in the click-through process.

### III. CONCLUSION

The Commission should heed intervenors' recommendations and—at a minimum—hold the IOUs to industry standards. The Proposed Decision should be modified to:

- 1) Create a streamlined process for customer disenrollment from conflicting DR programs that can be completed in a single online session;
- 2) Direct stakeholders to develop an Service Level Agreement (“SLA”) to establish clear performance expectations for the IOUs;
- 3) Direct IOUs to develop consistent login buttons that DRPs can use on their websites to direct customers to the click-through authorization process with confidence;
- 4) Require IOUs to communicate about unplanned click-through process outages within 60 minutes; and,
- 5) Provide DRPs with granular information about why customers fail to complete data sharing authorizations.

Respectfully submitted,

By: /s/ \_\_\_\_\_

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Dated: September 7, 2023

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## Appendix A

### **Recommended Changes to the Proposed Decision**

#### **A. Changes to Findings of Fact**

None.

#### **B. New Findings of Fact**

1. Further improvements, beyond those proposed by the IOUs, are needed to address the root challenges that Third-Party DRPs face and to improve the click-through authorization and data delivery processes.

#### **C. Changes to Conclusions of Law**

8. For customers to be able to provide access to their data to the DRP of their choosing with minimal friction and maximum portability, PG&E, SCE, and SDG&E should provide customers information during the CTP data authorization process to make them aware of enrollment conflicts, ~~an overview of the disenrollment process, and the timeframe for disenrollment given the requirements of the DR program they are currently enrolled in, and the opportunity to disenroll from the conflicting program online and in a single session.~~

#### **D. New Conclusions of Law**

1. To comply with the DR principle that “[d]emand response customers shall have the right to provide demand response through a service provider of their choice and Utilities shall support their choice by eliminating barriers to data access,” as adopted in D.16-09-056, further improvements are needed to address the root challenges that Third-Party DRPs face and to improve the click-through authorization and data delivery processes.

#### **E. Changes to Ordering Paragraphs**

5. Pacific Gas and Electric Company, Southern California Edison Company, and San Diego Gas & Electric Company must each clearly communicate on their respective existing Rule 24/32 metrics websites all Click-Through Process outages, whether planned or unplanned. If an outage is planned, it must be communicated on the respective investor-owned utility’s website as soon as the planned outage date and times are known and in no more than 24 hours from when the planned outage date and times are known. Unplanned outages must be communicated on the respective Rule 24/32 metrics websites in as close to real-time as possible and in no more than ~~24 hours~~ 60 minutes from the commencement of the unplanned outage.

6. Pacific Gas and Electric Company, Southern California Edison Company, and San Diego Gas & Electric Company must each implement the process described below to resolve enrollment conflicts for customers enrolled in an investor-owned utility (IOU)-administered demand response (DR) program wishing to enroll in a third-party demand response provider (DRP)-

administered demand response program. Successful disenrollment shall include a confirmation to both the customer and DRP. This process may be modified via Tier 2 advice letter.

### **Scenario 1 — No Waiting Period Before Disenrollment**

A pop-up window with the following information is provided at the end of the Click-Through Process:

- a. You have not been enrolled in [THIRD-PARTY DRP]'s demand response program because you are already enrolled in [IOU]'s demand response program. You are enrolled in [IOU-ADMINISTERED DR PROGRAM] program. CPUC rules prohibit dual enrollment in demand response programs.
- b. To enroll in [THIRD-PARTY DRP]'s demand response program, please first disenroll from your utility's demand response program. ~~Please find your program from the list provided below and call the number to disenroll.~~ Please select one of the following options:
  - i. Disenroll from [IOU-ADMINISTERED DR PROGRAM]
  - ii. Remain enrolled in [IOU-ADMINISTERED DR PROGRAM]
- ~~c. Once you have successfully disenrolled, please authorize the release of your customer data again by visiting the [IOU] webpage below.~~

If the customer elects to "disenroll," the following information is provided:

- a. You have been disenrolled from [IOU-ADMINISTERED DR PROGRAM] and enrolled in [THIRD-PARTY DRP]'s demand response program.

If the customer elects to "remain enrolled," the following information is provided:

- a. You have chosen to remain enrolled in [IOU-ADMINISTERED DR PROGRAM]. If you wish to enroll in [THIRD-PARTY DRP]'s demand response program, please disenroll from [IOU-ADMINISTERED DR PROGRAM] and authorize the release of your customer data again by visiting the [IOU] webpage below.

### **Scenario 2 — Waiting Period Before Disenrollment**

A pop-up window with the following information is provided at the end of the Click-Through Process:

- a. You have not been enrolled in [THIRD-PARTY DRP]'s demand response program because you are already enrolled in [IOU]'s demand response program. You enrolled in [IOU-ADMINISTERED DR PROGRAM] program on [DATE OF IOU-ADMINISTERED DR PROGRAM ENROLLMENT]. CPUC rules prohibit dual enrollment in demand response programs.
- b. To enroll in [THIRD-PARTY DRP]'s demand response program, you must first disenroll from [IOU]'s demand response program.
- c. Program rules require that you remain in the program for the remainder of the current enrollment period ~~[NUMBER OF DAYS UNTIL DISENROLLMENT IS ALLOWED]~~ days before disenrolling. If you choose to disenroll from [IOU-ADMINISTERED DR PROGRAM], the disenrollment will go into effect on [DATE OF

~~DISENROLLMENT]. The earliest date you can disenroll is [EARLIEST DATE FOR DISENROLLMENT]. Please find your program from the list below and call the number to disenroll on or after this date.~~

~~d. Please select one of the following options:~~

~~iii. Disenroll from [IOU-ADMINISTERED DR PROGRAM] (effective [DATE OF DISSENROLLMENT])~~

~~iv. Remain enrolled in [IOU-ADMINISTERED DR PROGRAM]~~

~~a. If you would like [THIRD-PARTY DRP] to contact you after the enrollment period is over, please check this box and [IOU] will share your email address with [THIRD-PARTY DRP].~~

~~b. Once you have successfully disenrolled, please authorize the release of your customer data again by visiting the [IOU] webpage below.~~

If the customer elects to “disenroll,” the following information is provided:

a. You have chosen to disenroll from [IOU-ADMINISTERED DR PROGRAM] and enroll in [THIRD-PARTY DRP]’s demand response program, which will go into effect at the end of your current enrollment period on [DATE OF DISSENROLLMENT].

If the customer elects to “remain enrolled,” the following information is provided:

a. You have chosen to remain enrolled in [IOU-ADMINISTERED DR PROGRAM]. If you wish to enroll in [THIRD-PARTY DRP]’s demand response program, please disenroll from [IOU-ADMINISTERED DR PROGRAM] and authorize the release of your customer data again by visiting the [IOU] webpage below.

## **F. New Ordering Paragraphs**

1. Pacific Gas and Electric Company, Southern California Edison Company, and San Diego Gas & Electric Company must develop a draft of a Service Level Agreement (“SLA”) as discussed in the Decision above and submit their draft to Energy Division as a Tier 2 Advice Letter within 90 days of the issuance of this Decision.
2. Pacific Gas and Electric Company, Southern California Edison Company, and San Diego Gas & Electric Company must submit a Tier 2 Advice Letter within 90 days of the issuance of this Decision to:
  - a. Submit a draft of a Service Level Agreement (“SLA”). The companies must joint develop the draft SLA consistent with the requirements of this Decision.
  - b. Develop consistent login buttons that Third-Party DRPs can use on their websites to direct customers to the Click-Through Process
  - c. Adopt the following set of error codes to be provided to the DRP in the event that a customer fails to authorize:
    - i. Invalid redirect Uniform Resource Identifier

- ii. OAuth secret error
- iii. Login system down
- iv. Account lookup error
  - v. User timeout on page
  - vi. User exited window
  - vii. User navigated away
- viii. User chose not to proceed (including following an incorrect password or a decline of the terms and conditions)
- ix. Information that will enable mapping between a customer session and the Rule 24/32 data provided upon a successful authorization