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ATTACHMENT A:

DATA REQUEST AND RELEASE PROCESS

1. Each utility will establish a consistent, streamlined, "one-stop" process for providing data to entities eligible to request acc to energy data as authorized in this decision. The process will include the following:

    a. Single point-of-contact in the utility for filing and processing of third-party energy usage data requests. The single point-of-contact will include a single email mailbox or website and other contact information to which requests for energy data access may be transmitted.

    b. The single point-of-contact information will be provided prominently and conveniently on the utility's website.

    c. The utility's website will provide access to an electronic input form for third-parties to request energy data access. The form will be consistent among PG&E, SCE, SDG&E, and SoCalGas.

2. The utility website is expected to eventually include a Data Catalog of energy data access requests made, fulfilled, and/or denied, among PG&E, SCE, SDG&E, and SoCalGas. New requests for data that have previously been received and fulfilled can easily be made available to eligible third-parties. Utilities must provide data without charge, but may record costs in a memorandum account and subsequently seek recovery via an application or general rate proceeding.

3. Within one business day of receiving a request form, from a third-party requesting access to energy data, the utility will respond by email or in writing acknowledging and confirming receipt of the request.

4. Within seven business days of receiving a request form from a third-party for access to energy data, the utility will respond by email or in writing regarding whether the information on the form is complete and, if incomplete, what additional information is required for the utility to process the request.

5. Within 15 business days of receiving a complete request for access to energy data from a third-party, the utility will respond by email or in writing regarding whether it is able to grant the request, and provide a proposed schedule for providing the requested data. If the utility responds that it cannot grant access to the data, it will provide specific reasons for why it cannot provide the data or offer other options for providing data access (such as providing data listed in the Data Catalog or suggesting modifications to the request such that it could be granted). If the requesting party disagrees with the utility's rejection of its request for data access or the alternative options offered by the utility, the third-party may bring the dispute for informal discussion before the Energy Data Access Committee established below.

6. Non-disclosure agreement: Prior to receiving access to energy data, the requesting party will execute a standard non-disclosure agreement (described in Section 10 below) if required by the utility as directed by this decision (Section 7.2), with substantially consistent terms and conditions among PG&E, SCE, SDG&E, and SoCalGas. In addition, if a pre-disclosure review of the third-party's information security and privacy controls and protections is recommended by the utility, the recommendations will be substantially consistent among PG&E, SCE, SDG&E, and SoCalGas and published in advance and available on the utilities' website. The requirements of this paragraph do not apply to entities or individuals seeking to obtain the aggregations identified in Section 3.5.5.~~2~~ of this Decision.

~~7. Terms of service: Local governments receiving aggregated and anonymous data need not sign an non-disclosure agreement but must accept the following terms of service:~~

~~a. The party will use the data for the purposes stated in the request.~~

~~b. The party will not release the data to another third party or publicly disclose the data.~~

~~c. Prior to the release of any data to a requesting local government the utility must inform the Executive Director of the Commission via a formal letter four~~

~~weeks in advance of the proposed transfer. The letter shall contain the following information:~~

~~1. The purpose identified by the party requesting data.~~

~~i. A description of the data requested and to be released.~~

7~~8~~. Simultaneous with the completion of Step 5, the utility must inform the Executive Director of the Commission via a formal letter of its proposed action. The utility must also send a copy of the letter to the requesting party. No census block level data shall be released ~~to university researchers, state or federal government agencies, or local government entities requesting census block level data~~ until four weeks have passed from the date of the letter informing the Executive Director of the Commission of the proposed transfer. For requests other than those made pursuant to Section 3.5.5~~.2~~ of this Decision, ~~T~~the letter shall also contain the following information:

a. The purpose identified by the party requesting data.

b. A description of the data requested and to be released.

c. The following contact information

1. Name (Individual and organization, if applicable)

2. Address

3. Phone and email address

For an entity that requests ongoing access to data without change in either purpose or data requested, following the initial formal letter to the Executive Director by a utility providing data, no advance letter is needed for subsequent transfers of the same type of data. Instead, both the utility and the requesting entity shall file a quarterly report identifying the data that it is continuing to send or receive and provide (and update as needed) the contact information listed in this requirement.

8~~9~~. The Energy Data Access Committee will meet at least once a quarter for the initial two years, and as necessary thereafter, to review and advise on the implementation of the utilities' energy data access programs, and to

consider informally any disputes regarding energy data access and make other informal recommendations regarding technical and policy issues related to energy data access.

9. Where a third party brings a dispute regarding access to data pursuant to Section 3.5.5.~~2~~ of this Decision to the Energy Data Access Committee, the Energy Data Access Committee shall meet within 2 weeks of receipt of the dispute and make a recommendation on access to the requested data within 4 weeks of receipt of the dispute.

10. If a party does not accept the recommendation of the Energy Data Access Committee, that party maintains full rights to request a formal consideration of the matter by the Commission via the Commission's petition process. If the Access Committee recommends against providing access to the data requested by a third-party, that party may file a petition with the Commission seeking clarification of access rules. If the Access Committee recommends providing access to the data and a utility declines to follow the recommendation, the utility should similarly file a petition seeking clarification of Commission policies concerning whether that particular request is consistent with Commission policies and privacy laws.

11. Nothing in this process requires or authorizes a utility or a third-party to violate any existing privacy or information security laws, rules or orders, including the Commission's privacy rules. Nothing in this process requires or authorizes a utility or a third-party to transfer, sell, or license energy data that consists of the utilities' intellectual property, trade secrets, or competitively-sensitive data. The transfer, sale or licensing of such intellectual property, trade secrets and competitively-sensitive data will be subject to Commission review and approval consistent with existing Commission rules and orders regarding the sale, transfer or licensing of utility assets.

12. All data outputs will be in standard formats. Data will be accessible in specified formats such as comma-delimited, XML, or other agreed-upon formats. Customized outputs or formats should be avoided. The Energy

Data Access Committee can review formats annually to ensure that the utilities are consistent with current technology trends for data sharing formats.

13. Mechanisms for handling data delivery for requests of all sizes in a secure manner should be standardized. To the extent possible, utilities will provide data through the customer data access program adopted in Decision (D.) 13-09-025. Some requests may be very small and require very little effort to transmit or deliver. Others could be gigabytes in size. In addition, sensitive customer information or other information subject to protections must be transmitted to the third party with reasonable encryption. By standardizing delivery mechanisms, utilities and third-parties will provide pre-approved delivery methods for sensitive information, reducing risk as well as the time to transmit and receive the data.

(END OF ATTACHMENT A)