2024

Consent to Share User Manual

USER MANUAL FOR THIRD PARTIES

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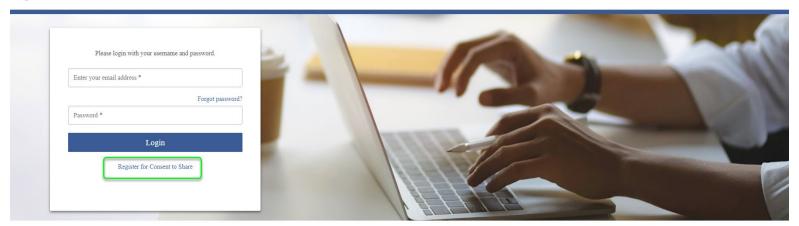
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How to register

1. Choose Log in to the Portal from the <u>www.sdge.com/loa</u> website. Select Third Party Login. Click on 'Register for Consent to Share' from the login screen.

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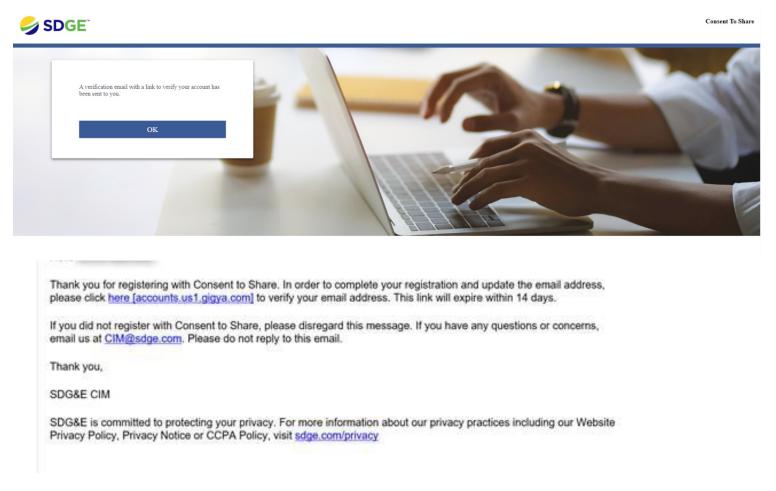
Consent To Share



2. Complete the registration form.

Consent To Share SDGE" Register with your email and password: First name * Email * Last name * 0 Phone Extension Password * Confirm password * Company Name By clicking the check box, you acknowledge that you have fully reviewed and agreed to the Consent to Share Terms and Conditions, the Terms and Conditions of the SDG&E Web Site, and, if applicable, the Mobile Terms and Conditions, each as a referenced therein. * Mailing address City Submit State Postal code United States ~

3. Once submitted, you will receive a verification email in the email address you provided.



4. Click on the link and your email address will be verified.

Email Verification

Thank you, your email address is now verified on our system.

5. You will receive another email confirming the registration.

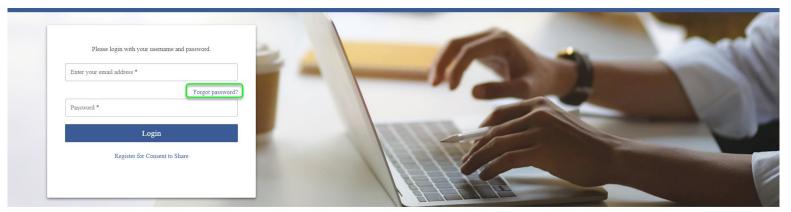
You can now go back to the login screen and enter your newly registered email address and password.

Forgot Password

1. Choose 'Forgot Password' from the login screen.

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Consent To Share



2. Enter the registered email address and click 'Submit"

Constraints of the second seco

3. Confirmation message will be displayed.

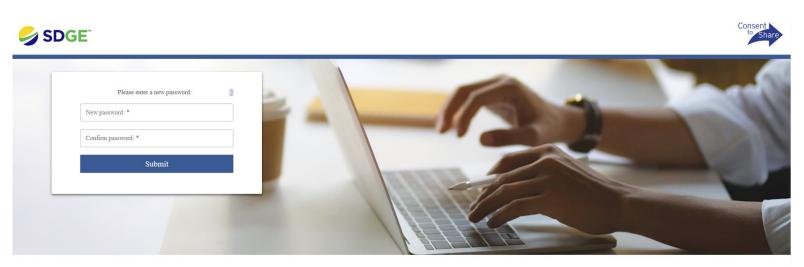


4. Click the link in the email.

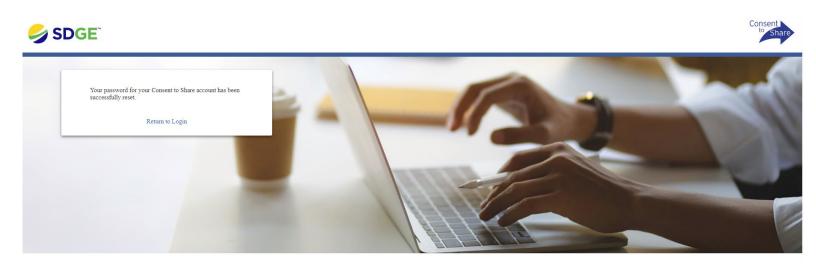
SDG&E Consent to Share Password Reset

From: no-reply-cts@ext.sdge.com
Hello Internet in the second
We have received your request to reset your Consent to Share password. In order to complete your password reset, please click here.
If you did not request a password reset, please disregard this message. If you have any questions or concerns, email us at CIM@sdge.com. Please do not reply to this email.
Thank you,
SDG&E CIM
SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit sdge.com/privacy

5. Enter the new password and click 'Submit.'



6. Confirmation message will be displayed. You may now use the new password to log in.



7. An email is also sent for confirmation.

SDG&E Consent to Share Password Reset

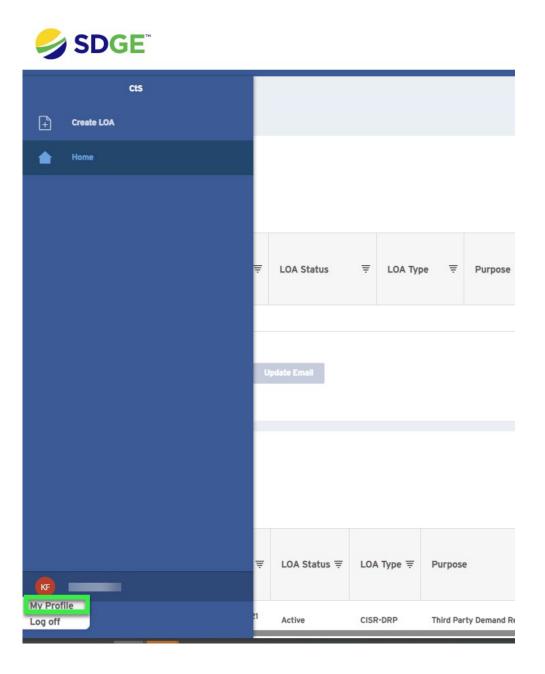
From: <u>no-reply-cts@ext.sdge.com</u> Subject: SDG&E Consent to Share Password Reset

Dear ,
Your password for Consent to Share account has been successfully reset. If you did not change it, please reset the password to protect your account
If you have any questions or concerns, email us at CIM@sdge.com. Please do not reply to this email.
Thank you,
SDG&E CIM

SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit sdge.com/privacy

How to view and update your profile information

You may view your profile information from on the bottom left corner 'My Profile.'



Update Password

1. In the Profile screen, click 'Update Password.'

99	SDGE						Search Site Consent To Share
cts	KF	First Name Email Phone number Mailing Address Mailing State Organization Group Name Update Organization Group Update Profile Update Profile Update	_	Last Name Company Name Extension Mailing City Mailing Country Daleta Account			Close
			Rates And Regulations	FERC Standards Of Conduct - Order 717 Energy Innovation Center	CPUC Postings Major Projects	Total Electric Rates Careers	
			Customer Choice	Terms & Conditions	Customer Service	Privacy Center	
				hany is a subsidiary of Sempra Energy®. SDG&E® and S lectric Company. The trademarks used herein are the pr			

2. In the new window, enter the current password and the new password, then click 'Update Password.'

	To change your password, please fill in the fields below:			-
	Current password: *	10		4
	New password: *	-	2	
	Confirm new password: *	T		
	Update Password			
-	Please close this browser window when finished			

After updating, close the window.



<u>Update Email</u>

1. In the Profile screen, click 'Update Email.'

ø	SDGE						Search Site Consent To Share
ess	KF	First Name Email Phone number Mailing Address Mailing State Organization Group Name Update Organization Group Update Profile U		Last Name Company Name Extension Mailing City Mailing Zip Mailing Country			Close
			Rates And Regulations Energy Data Request Customer Choice	FERC Standards Of Conduct - Order 717 Energy Innovation Center Terms & Conditions	CPUC Postings Major Projects Customer Service	Total Electric Retes Careers Privacy Center	
KF				pany is a subsidiary of Sempra Energy®. SDG&E® and S Electric Company. The trademarks used herein are the pr			

2. In the pop-up screen, provide the new email address and click 'Submit.'

9	SDGE			Search Site
	KF	First Name Email Phone number Mailing Address Mailing State Organization Group Name	Last Name Tussue Company Name Extension Mailing City unum tussue Mailing Zip Mailing Country	
		Update Organization Group Update Profile Update Peasword Update 1	Update Email Enter new email address Confirm new email Cancel Submit	Close



3. A confirmation message will be displayed on screen.

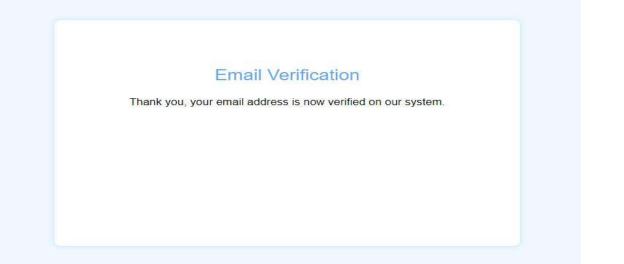
SDGE"	Search Site
Email Phone number Mailing Address Mailing Address Organization Group N 	

4. Click on the verification link from your email to complete the update process.

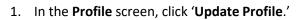
[EXTERNAL] SDG&E Consent to Share Registration Verification

No-reply-cts@ext.sdge.com To To Sempra Default Inbox Retention (60 days) Hello ,	Expires 8/3/2024			
Thank you for registering with Consent to Share. In order to complete your registration and update the email address, please click	x here [accounts.us1.gigya.com] to verify your email address. This link will expire within 14 days.			
If you did not register with Consent to Share, please disregard this message. If you have any questions or concerns, email us at CIM@sdge.com. Please do not reply to this email.				
Thank you,				
SDG&E CIM				
SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy F	Policy, Privacy Notice or CCPA Policy, visit sdge.com/privacy			

5. Confirmation will be displayed, and you may now log in with your new email address.







SDGE"					Search Site Consent To Share
Email Phone number Mailing Address	Com Exten Mail Name ① Mail ation Group	Name Islion Islion			Close
	Rates And Regulations Energy Data Request	FERC Standards Of Conduct - Order 717 Energy Innovation Center	CPUC Postings Major Projects	Total Electric Rates Careers	
	Customer Chelce San Diego Gas & Electric® Company is a	Terms & Conditions subsidiary of Sempra Energy®. SDG&E® and S	Customer Service an Diego Gas & Electric are registered trader	Privacy Center narks of San Diego Gas & Electric Company.	
85	© 1998-2020 San Diego Gas & Electric C	Company. The trademarks used herein are the p	operty of their respective owners. All rights	reserved.	

2. In the pop up screen, update the profile info and click 'Submit.'

SDGE"	Search Site
Organization Group Na	Last Name *



3. A confirmation message will be displayed.

🤣 SDGE"			Search Site Consent To Share
cs ► KF	First Name Email Phone number Mailing Address Mailing State Organization Group Name	Last Name Company Name Extension Mailing City Mailing Zip Mailing Country USA	
	Update Organization Group Thank you. Your profile information has been update successfully. Update Profile Update Pessword Update E		Close

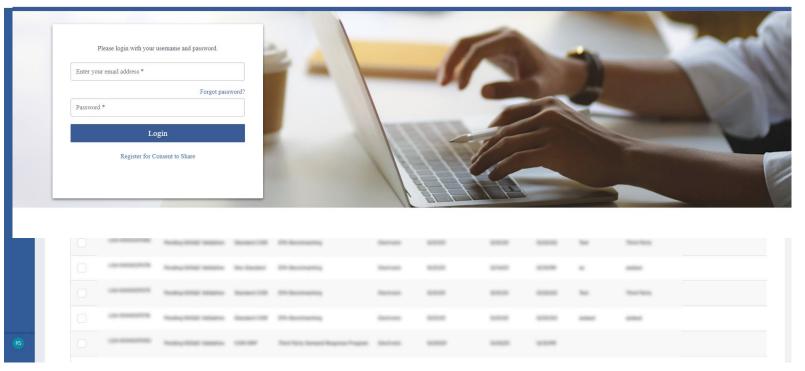


How to create a Standard CISR LOA electronically

1. Choose Log in to the Portal from the <u>www.sdge.com/loa</u> website. Select Third Party Login. Use your Consent to Share application credentials.

SDGE

Consent To Share



2. After logging in, click on 'Create LOA.



3. A new screen will be displayed where you may identify yourself.

am the 🖈	0
Select	~
Select. Building Owner Demand Response Provider Property Manager Other Third Party	⊡ ★ IC
o you want to start a new LOA or Upload a signed LOA	upload a signed LOA?

4. Now select the **purpose for your LOA**. If you are a Demand Response (DR) Provider, select '**Third Party Demand Response Program.**' An LOA specific for the Rule 32 program will be created called a CISR-DRP. If any other optionis selected, a Standard LOA will be initiated which is also called a Standard CISR form.

I am the *	(I)
Building Owner	~
I need authorization for the following progr	ram or reason * ①
Select	~
Select EPA Benchmarking Seeking to Act on Behalf of Customer Other Purpose	A?
Do you want to add more than one custom	er to this Letter of Authorization transaction?*
Yes No	





5. By default, 'Start a new LOA' will be selected. This will initiate the electronic process to create the LOA. If you already have the signed LOA with you and wish to upload it, please choose the option 'Upload a signed LOA'. Click 'Create LOA.'

am the 🛪	0	
Building Owner	~	
need authorization for the follow	ing program or reason 🍝 🛈	
EPA Benchmarking	~	
Do you want to start a new LOA or	upload a signed LOA?	
-	customer to this Letter of Authorization to	ransaction?*
Yes O	No	

- 6. Select 'Yes' if you have more than one customer as part of this same LOA. If not, choose 'No'.
- 7. A questionnaire will display on the screen asking for initials and number of accounts associated with LOA request.

9	SDGE	Search Site	Consent To Share
CtS	Standard CISR Questionnaire		í
£	Please answer the questions below on behalf of the customer (your client). Your responses will help us personalize the C15 form with the appropriate authorization options. How many service accounts will you be including in this request? *		
	Cancel		Submit

8. Please answer the questions below on behalf of the customer (your client). Your responses will help us personalize the CtS form with the appropriate authorization options. How many service accounts will you be including in this request? Note, you will be required to enter a valid email address which will be utilized solely to send the requested data. This email address does not serve as the main contact for correspondence.



cts	Standard CISR Questionnaire
÷	Please answer the questions below on behalf of the customer (your client). Your responses will help us personalize the CtS form with the appropriate authorization options.
	How many service accounts will you be including in this request? *
	Would you like the Third Party to act on your behalf (e.g. a property manager or utility manager)? *
	O Yes
	No
	How long would you like to share data with your Third Party? *
	O One time
	One year
	Until this date (three years maximum)
	By default, SDG&E waits for the Third Party to contact them to request the 15-minute interval usage data. Once your Letter of Authorization (LOA) is active, please contact 3rdPartyReo@sdge.com to request this data.
	If the Third Party requires historical data further back than 12 months, have them contact SDG&E after they have received your authorization.
	What email address would the Third Party like to receive the data or account information? *
	Cancel

9. An online form will be displayed to fill out the necessary information for the LOA. Fields marked with '*' are mandatory to complete.



10. Enter the information in the **Customer Contact Information** section to the best of your knowledge. <u>Important</u>: The **First Name** and **Last Name** entered match the billing information associated with the SDG&E customer. You can find this information on the customer's monthly SDG&E bill. Any discrepancies in the name may result in SDG&E validation failure, and the Letter of Authorization (LOA) could be returned to you for correction, potentially causing delays in the overall process. The customermay also update this information when they sign the LOA.

Important Note: SDG&E will be contacting the customer at this email address to get their signature. Customer's mailing address and email address must be unique and different from the Third Party.

1	SDGE		Search Site
cts +	🚖 - 🗘	Contact & Service Account Info	Close Print Filled LOA Print All Added Service Accounts
ු ර	LOA Actions - Purpose Seeking to Act on Behalf of Customer Start Date	Customer Contact Information Is this a Residential or Business Customer? *	
Ð	Start Date End Date Status DRAFT	Residential Business	Mailing Country
ጽ	Internal Status DRAFT	Please provide a first name	United States of America
0	Assigned Created	Last Name * Please provide a last name	Mailing Address Please provide street number and street name
	Time in Queue	Organization Name Please provide the customer's organization name	Malling City Please provide the city
Ô	Details	Title Please provide the customer's title at the organization	Mailing State / Province CA
	Special Instructions Case Log	Email address * Piease provide a valid email address	Mailing Zip
	Comments	Confirm Email Address *	Please provide the zip
	Data Disclosure Information	Please confirm the email address Phone number * Extension	
		Enter a 10 digit number	
۰		Note: Customer's mailing address and email address must be unique and different from the Third Par	ty.

If you selected "**multiple customer**' in the same LOA in the previous step, a grid will be displayed where you need to add the customer information.

cts	🔁 – 🔹 🌣	Contact & Service Account Info	
₽	LOA Actions -	Close Print Filled LOA	Print All Added Service Accounts
	Purpose Seeking to Act on Behalf of Customer Start Date End Date Status DRAFT Created	Customer Contact Information What is the name of the Letter of Authorization group? *	
		Email address \overline Confirm Email Address \overline First Name \overline Last Name \overline Dependence Number No items	Phone Extension 👳



- 11. Enter the **Service Address Information** to fill it on behalf of the customer. This is an optional step for you. The customer must enter this information when they sign the LOA.
 - a. Add service account numbers one at a time by clicking 'Add account number. 'You can enter the details in the table displayed on the screen.
 - b. If you have multiple accounts to add, download the template by clicking the <u>link</u>. Add your accounts in the **service account number template** and save the file. Then upload the file using '**Choose File**.'. Once uploaded, click '**Bulk Upload Service Accounts**' to complete the upload.

Important: Service Account numbers can be found on the SDG&E monthly bill. Note: only include the first 10 or 12 digits, do not include any additional digits, spaces, dashes, or periods.

LOA Actions									
Purpose Start Date End Date Status	Other Purpose	5	Click "Add account number" to add Service Account Nu			onthiy bill.			
Created			Service Account Number Enter an account number f you have several account numbers to add, you may uply		Service Address Enter the service address ing the excel template provided below.	₹	Service City Enter the service city	₹	
		0	Click "Choose File" to select the excel file to upload. Choose File No file chosen Click "Bulk Upload Service Accounts" to complete the up			on your local computer.			
	LOA Actions Purpose Start Date End Date Status	LOA Actions - Purpose Other Purpose Start Date End Date Status DRAFT	LOA Actions - Purpose Other Purpose Start Date End Date Status DRATT Created	LOA Actions • Purpose Other Purpose Start Date End Date Status DRAFT Created If you have several account number to add, you may uplow If you have several account numbers to add, you may uplow If you have several account numbers to add, you may uplow If you have several account numbers to add, you may uplow If you have several account numbers to add, you may uplow If click "Choose File" to select the excel file to upload. Choose File" to select the excel file to upload.	LOA Actions · Purpose Other Purpose Start Date End Date Status DRAFT Created I Enter an account number I Iclick "Choose File" to select the excel template. Add the service account number I Click "Choose File" to select the excel file to upload. Choose File" No file chosen Click "Bulk Uplead Service Accounts" to complete the upload process and to the service account of the upload process and to the service account of the upload process and to the service account of the upload process and to the upload service Accounts" to complete the upload process and to the upload service Accounts" to complete the upload process and to the upload service Accounts" to complete the upload proceses and to the upload service Accounts" to complete t	LOA Actions • Purpose Other Purpose Start Date End Date Status DRAFT Created I Enter an account number Revice Address Information Enter the service account number can be found on the molecular op additional digits, spaces, dashes, or periods. I Enter an account number I Enter an account number I Enter an account number is to add, you may upload them in bulk using the excel template provided below. I Crick "choose File" to select the excel file to upload. Crick "Choose File" to select the excel file to upload. Crick "Bulk Upload Service Accounts" to complete the upload process and to add the service account numbers to the LOA.	LOA Actions • Purpose Other Purpose Start Date Ind Date Status DRAFT Created I Enter an account number I Enter the service address If you have several account number to add, you may upload them in bulk using the excel template provided below. Click "Choose File" to select the excel file to upload. Choose File" to select the excel file to upload. Choose File" to select the excel file to upload. Choose File" to select the excel file to upload. Choose File" to select the excel file to upload.	LoA Actions - Purpose Other Purpose Start Date - End Date - Status DRAFT Created - - <th>LA Actions - Purpose Other Purpose Star Date Date Statis DRATT Created</th>	LA Actions - Purpose Other Purpose Star Date Date Statis DRATT Created



12. Now, review the **Primary Third Party/DRP Contact Information** which will be pre-populated. The basic information from your profile will be auto-populated for ease of use. Provide a **valid email address** as it will be used by SDG&E as a primary contact for all correspondence related to this LOA. If the email address included within the LOA is different than the email address used to register for Consent to Share, LOA's will not appear on your **CtS** main dashboard. The **mailing address and phone number** will be used as secondary contact information. Also, choose the **method of data disclosure**.

🗢 – 🏠		
	Primary Third Party / DRP Contact Information	
LOA Actions -	Organization Name *	Mailing Country *
Purpose Seeking to Act on Behalf of Customer		United States of America
Start Date	First Name *	Mailing Address *
End Date		
Status DRAFT	Last Name *	Malling City *
Internal Status DRAFT	=	
Assigned	Email address *	Malling State / Province *
Created		
Time in Queue	Confirm Email Address *	Malling Zip *
	Phone number * Extension	
	The Utility will provide the information requested above, to the extent available, via any one of the following channels. My (Agent) preferred format is:	
	O Email	Email address *
	Hard copy via US Mall (If applicable)	
	Fax	Re-Enter Email Address *



13. In the next screen, you may choose the specific options that you want the customer to provide the authorizations.

9	SDGE	-		Bearch Stile Consent To Sha
cts	•		Contact & Service Acco	unt linfo Customer Actions Authorized
Ð				Close Print / Tilled LOA Print All Added Service Accounts
	LOA Actions	•	Customer Actions	Authorized
	Purpose Start Date	Seeking to Act on Behalf of Customer		ce you want the customer to initial.
	End Date	-		ny Agent to act on my behaif to perform the following specific acts and actions (Initial all applicable baxes but at Heast one MUST be initialed):
	Status	DRAFT		1. Request and receive billing recerds history and all meter usage data used for bill calculation for all of my account(d), as specified herein, regarding utility services furnished by the Utility
	Assigned Created			2. EPA Benchmarking (authorizes usage information to be uploaded to the EPA's ENERGY STAR Portfolio Manager®)
				3. Request and receive copies of correspondence with my account(s) concerning (initial all that apply)
				3a. Verification of rate, date of rate change, and related information
				3b. Contracts and Service Agreements
				3c. Previous or proposed issuance of adjustments/credits
			•	3d. Other previously issued or unresolved/disputed billing adjustments.
				4. Request Investigation of my utility bill(s)
				5. Request special metering, and the right to access interval usage and other metering data on my account(s)
				5. Request special metering, and the right to access interval usage and other metering data on my account(s)
				6. Request rate analysis
		1		7. Request rate changes
				8. Request and receive verification of balances on my account(s) and discontinuance notices.
				9. Other acts and functions (please specify)
				Online access to MyAccount
			Continue Offline (Pap	er) Save and Close Continue Online (Electronic)

- 14. Select Continue online to complete the LOA electronically.
 - *Note : For quicker processing, CtS will automatically collect signatures, and will provide an LOA ID to track your submission.

	9. Other acts and functions (please specify)			
	Online access to MyAccount			
Continue Offline (Paper)		Save and Close	Continue Online (E	(ectronic)
				For quicker processing, CtS will automatically collect signatures, and will provide an LOA ID to track your submission.

15. In the next screen, click '**Review Filled LOA'** to download the information from the previous screen in the PDF format. Review the information thoroughly. Then read the **declare statement** displayed on the screen and select the check box accordingly if you agree.



Consent to Share User Manual

SDG	βE [*]		Search Site
	û	Contact & Service Account Info Customer Actions Authorized Lega	Review
LOA Act	tions -		Close Print Filled LOA Print All Added Service Acc
Purpose	Seeking to Act on Behalf of Customer	Legal Review	
Start Date		Please review the completed Letter of Authorization	
End Date	-		
Status	DRAFT	Review Filled LOA	
Created	-	Review All Added Service Accounts	
		If you added more than two Service Accounts, you may review those by clicking	"Review All Added Service Accounts."
	2	PLEASE CHECK THIS BOX TO CONFIRM YOU HAVE READ THE STATEMEN	T BELOW *
		authorization and from the taking of any action pursuant to this authorization, i	
		Close	«Beck Seve and Close S
			AUTHORIZATION TO: RECEIVE CUSTOMER INFORMATION OR ACT ON A CUSTOMER'S BEHALF
	AUTHORIZATION TO: RECEIVE	Shree	I (CUSTOMER) AUTHORIZE THE RELEASE OF MY ACCOUNT INFORMATION AND AUTHORIZE MY AGENT TO
	OR ACT ON A CUSTOMER'S BE	TALF	ACT ON MY BEHALF ON THE FOLLOWING BASIS ² (<u>initial</u> one box only): One time authorization only (limited to a one-time request for information and/or the acts and functions specified
		(Please Philtor Type)	above at the time of receipt of this Authorization). One year authorization - Reguests for information and/or for the acts and functions specified above will be
	I,NAME	TITLE OF APPLICABLE	accepted and processed each time requested within the twelve month period from the date of execution of this Authorization.
of	(Customer) have the following mailing address	Authorization is given for the period commencing with the date of execution until	
	NAME OF CUSTOMER OF RECORD	, and do hereby appoint	functions specified above will be accepted and processed each time requested within the authorization period specified herein.
	NAME OF THERD PARTY	of Maximo Accesso	RELEASE OF ACCOUNT INFORMATION:
	NAME OF THIRD PARTY		The Utility will provide the information requested above, to the extent available, via any one of the following. My (Agent) preferred format is (check all that apply):
	to act as my agent and consultant (Agent) for	state zp he listed account(s) and in the categories indicated below:	Hard copy via US Mail (if applicable).
	ACCOUNTS INCLUDED IN THIS AUTHORIZAT		Faosimile at this telephone number: Electronic format via electronic mail (if applicable) to this e-mail address:
	1. GERVICE ADDRESS	CITY SERVICE ACCOUNT NUMBER	I (Customer),(print name of authorized signatory), declare under penalty of
	2. SERVICE ADDRESS	OITY SERVICE ACCOUNT NUMBER	perjury under the laws of the State of California that I am authorized to execute this document on behalf of the Customer of Record listed at the top of this form and that I have authority to financially bind the Customer of Record. I further certify
	(For more than two accounts, please list additional accounts o	a separate sheet and attach R to this form)	that my Agent has authority to act on my behalf and request the release of information for the acocurs listed on this form and perform the specific acts and functions listed above. I understand the Utility reserves the right to verify any authorization request submitted before releasing information or taking any action on my behalf. I authorize the Utility to
	INFORMATION, ACTS AND FUNCTIONS AUTH Agent must thereafter provide specific written	ORIZED – This authorization provides authority to the Agent. The instructions/requests (e-mail is acceptable) about the particular	autonization request submitted before releasing information or taking any action on my behani. I autonize the durity to release the requested information on my account or facilities to the above Agent who is acting on my behalf regarding the matters listed above. I hereby release, hold harmless, and indemnify the Utility from any liability, claims, demands,
	account(s) before any information is release	d or action is taken. In certain instances, the requested act or er. Requests for information may be limited to the most recent 12	causes of action, damages, or expenses resulting from: 1) any release of information to my Agent pursuant to this Authorization; 2) the unauthorized use of this information by my Agent; and 3) from any actions taken by my Agent
	month period.	behalf to perform the following specific acts and functions (initial	pursuant to this Authorization, including rate changes. I understand that I may cancel this authorization at any time by submitting a written request. [This form must be signed by someone who has authority to financially bind the
	all applicable boxes):	benan to perform the following specific acts and functions (mittain	customer (for example, CFO of a company or City Manager of a municipality).]
	 Request and receive billing records, bill account(s), as specified herein, regardir 	ng history and all meter usage data used for bill calculation for all of my g utility services furnished by the Utility ¹ .	AUTHORIZED CUSTOMER SIGNATURE TELEPHONE NUMBER
	2. EPA Benchmarking (authorizes usage	nformation to be uploaded to the EPA's ENERGY STAR Portfolio Manager®).	Evented the stored at
		indence in connection with my account(s) concerning (initial all that apply):	Executed this day ofYEAR atatat
	 b. Contracts and Service / c. Previous or proposed is 	suance of adjustments/credits; or	I (Agent), hereby release, hold harmless, and indemnify the Ubilty from any liability, claims, demand, causes of action, damages, or expenses resulting from the use of outsomer information obtained pursuant to this authorization and from the taking of any action pursuant to this authorization, including rate changes.
	d. Other previously issued 4. Request investigation of my utility bili(s	or unresolvedidisputed billing adjustments.	
		to access Interval usage and other metering data on my account(s).	AGENT GIGNATURE TELEPHONE NUMBER
	6. Request rate analysis.		VAN WAS A CONTRACT OF CONTRACT.
	7. Request rate changes. 8. Request and receive verification of ball	nces on my account(s) and discontinuance notices.	Evented this dou of
	9. Other acts and functions (please specified)		Executed this day ofYEAR
	I may be responsible for charges that may be incurred to process this n	rup to two times in a 12 month period per service account. After two requests in a year, I understand quest. Form 185-1000	² If no time period is specified, authorization will be limited to a one-time authorization Revised 1/2014 Form 165-1000
	Revised 1/2014		Bevised 1/2014 Form 185-1000

16. Click **'Submit'** to generate the LOA ID and provide your signature. You may choose to **'Save and Close'** the LOA if you are not ready to sign it. If you save the LOA for later, you have 60 days to complete the signing process. After 60 days, the LOA will automatically expire, and you will have to create a new LOA.



17. In the final **Review** screen, you will be asked to provide your signature. Click '**Complete Review**' when done. <u>Important</u>: Make sure to click '**Accept**' after signing so the signature will be accepted on the application.

-				
CtS	🔁 LOA-0000040176 😭	Contact & Service Account Info Customer Actions Authorized Legal Review Review and Sign		$ \rightarrow$
Ð		Close Print Filied LOA Print All Added Service Accounts		
	LOA Actions -		Files & documents (0)	0
8	Purpose EPA Benchmarking	Customer Contact Information	No items	
	Start Date	Type Phone number Full Name Extension	No nems	
	End Date	Email address		
	Created	Mailing Address		
		Customer Signed Date		
		Service Address Information		
		Service Account Number 🛛 🐺 Service Address 🐨 Service City 🐨		
		Service Account Number 🖤 Service Address 🖤 Service City 🖤		
		Primary Third Party/DRP Contact Information		
		Pull Name Organization Name		
		Emell address Phone number		
		Mailing Address Extension		
		Primary Third Party/DRP Signed Date		
		Customer Actions Authorized		
		Please check the boxes you want the customer to initial.		
		1 () authorize my Agent to act on my behalf to perform the following specific acts and actions (initial all applicable boxes but at least one MUST be initialed):		
		X 1. Request and receive billing records history and all meter usage data used for bill calculation for all of my account(s), as specified herein, regarding utility services furnished by the Utility		
		2. EPA Benchmarking (authorizes usage information to be uploaded to the EPA's ENERGY STAR Portfolio Manager®)		
		X 3. Request and receive copies of correspondence with my accountist concerning (initial all that apply)		
		A. Request investigation of my utility biliss		
		X 5. Request special metering, and the right to access interval usage and other metering data on my account(s)		
		G. Request rate analysis		
		X 7. Request rate changes		
		X 8. Request and receive verification of belances on my account(s) and discontinuance notices.		
		9. Other acts and functions (please specify)		
		Electronic Signature		
		If someone else from your organization is required to sign this form, please check the box and provide the contact information of the authorized signatory. After you click Submit, this person will receive an email with a link to provide their e-signature.		
		I, hereby release, hold harmless, and indemnify the Utility from any liability, claims, demand, causes of action, damages, or expenses resulting from the use of customer information obtained pursuant to this authorization, including rate changes.		
		1 ~~~~		
		Accept Clear		
		Would you like to make a data request or include special instructions with this LOA?		
		Yes, I would like to request data or provide special instructions now. No, data will be requested later.		
2 6				
		Concel K Back Save and Close Complete Review		
				-



Consent to Share User Manual

Important: Review all the information thoroughly before signing. You may also use the links provided at the top of the screen to navigate to a specific screen.

Contact & Service Account Info	Customer Actions Authorized	Legal Review	Review and Sign						
					Close	Print Filled I	LOA Print All	Added Service Account	s
If you would like to ma	ake any changes, plea	se use the '	Back ' button	at the bottom o	of the scre	en.			
Close						« Back	Save and Close	Complete Review	П

In the same screen, you may upload additional documents that you would like SDG&E to review. This is an optional step.

In the 'Files and documents' section on the right-hand side, click the gear icon.

	0	Files & documents (0)	٥			
		No items				
Attach f		aded here will be scanned by our system	m and can take up t	to 20 minutes for ot	her parties to view the	file.
		Drag	and drop files here			
			or Select file(s)			
Cancel						Submit

Select the files you wish to upload.



Select the category of the file you uploaded. Choose '**Othe**r' if none apply.

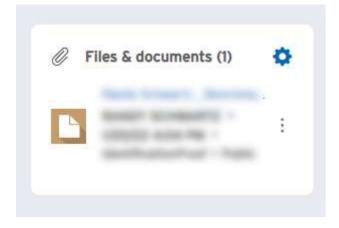
ttach file(s)			
All files uploaded here	will be scanned by our system an	d can take up to 20 minutes for oth <mark>er pa</mark> rties t	to view the file.
		A	
		Drag and drop files here	
		or	
		Select file(s)	
Name *	File	Category	Classification
Cancel	 Base counts, deal Second 	LOA Form Select LOA Form List of Service Accounts Identification Proof Property/Rental/Lease Agreen Utility Bill Special Instructions	Public ~
		Revoke Document Other	

Choose the classification for the attached file to determine who should be allowed to see it.

Attach file(s)						ACCOUNTS	0	Files & documents (0)	¢
All files uploaded here will	be scanned by our system and can take up to	o 20 minutes for other parties to	view the	file.				No items	
	Drag and dro	8							
Name *	File	Category		Classification	A	Ŧ		Laboration of CDC B.F.	
Randy Schwartz_Benci	Randy Schwartz _ Benchmarking_Full Paper.pdf	Identification Proof	~	Public ~	Private - Docur Public - Docum	nents in this classification	n will be viewab	ole to you and SDG&E only. le to all users with access to this L	.OA case.
Cancel					Submit				



After you click 'Submit,' you will see the file under the Files and Documents section.



The screen also provides you an option to enter any special instructions to SDG&E related to the LOA. Use the radio button options at the bottom of the page. Note that the instructions you enter here are not shared with the customer. This information is later viewed by SDG&E only.

structions can include: waiting a specific period of time before sharing data;

On some occasions, you may want someone else to sign the LOA on your behalf. Select the checkbox provided above the signature box. Provide the email address where SDG&E should send the LOA to be signed. The authorized signatory will not be allowed to edit any information in the LOA.



Electronic Signature	
If someone else from your organization is required to sign this form, please check the be person will receive an email with a link to provide their e-signature.	ex and provide the contact information of the authorized signatory. After you click Submit, this
Email address *	
Re-Enter Email Address *	
Would you like to make a data request or include special instructions with this LOA?	
Yes, I would like to request data or provide special instructions now.	No, data will be requested later.

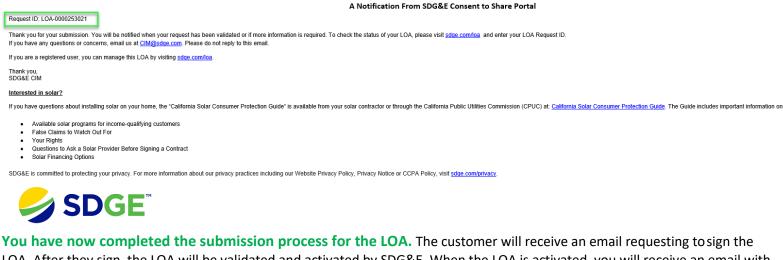
1. After you sign and click '**Complete Review**,' an acknowledgment screen will be displayed. The LOA is now in the waiting status for the third party to sign. You can no longer make changes to the LOA. You may download a copy of the LOA for your reference using '**Print**' at the top of the screen or from the **Files and Documents**.

9	SDGE						Search Site	ent To Share
CtS	🕞 LOA-0000253021 🏠 🕯					Close Print Filled LOA	Print All Added Service Accounts	←
E		Customer Information						
	To do	Туре	Business		Organization Name			2
Q	D Waiting for Action Go	Full Name			Title			0
€)	LOA Actions -	Email address	2		Phone number			
ጽ	Purpose Seeking to Act on Behalf of Customer	Mailing Address			Extension			
?	Start Date	Customer Signed Date						
	End Date Status PENDING-CUSTOMER SIGNATURE Internal Status	Service Account Informa	tion					
ull A	Assigned	Service Account Number	er	= Service Address	÷	Service City	Ŧ	
Ô	Created	1						1
œ	Updated Time in Queue	2						
	Details							
	Special Instructions	Primary Third Party/DRP	Information					
	Case Log	Full Name			Organization Name			
4	Comments	Email address	2		Mailing Address			
FM	Data Disclosure Information	Phone number			Primary Third Party/DRP Sig	gned		ŞÔ



Consent to Share User Manual

2. You will receive an email with the confirmation along with the LOA ID. Please use this ID in your future correspondence with SDG&E related to this request.



LOA. After they sign, the LOA will be validated and activated by SDG&E. When the LOA is activated, you will receive an email with the executed LOA for your recordkeeping. If there were any issues during validation, you will be notified about the next steps.

Signed LOA.PDF								
Signed LOA-PDF 312 KB Ltd of Service Accounts.XLSX 8 KB								
A Notification From SDG&E Consent to Share Portal								
Request ID : LOA-0000253021 A Letter of Authorization (LOA) to share customer information of with you has been validated and the request is now active. This means you are now eligible to receive the customer's information as authorized in the LOA. A copy of the LOA has been attached for your records. Depending on the program for which the LOA was intended, you should be receiving the data shortly. If you have any questions or do not receive your data in the next several days, please contact your SDG&E customer information Management at <u>cim@sdge.com</u> . Please do not reply to this email. If you are a registered user, you can manage this LOA by visiting <u>sdge.com/toa</u> . Thank you, SDG&E CM Intersted in solar2 If you have questions about installing solar on your home, the 'California Solar Consumer Protection Guide' is available from your solar contractor or through the California Public Utilities Commission (CPUC) at California Solar Consumer Protection Guide. The Guide includes important information on:								
In you have questions about installing solar on your nome, the California Solar Consumer Protection Guide is available from your solar contractor of through the California Public Unlines Commission (CPUC) at <u>California Solar Consumer Protection Guide</u> . The Guide includes important information on: Available solar programs for income-qualifying customers False Claims to Watch Out For Your Rights Questions to Ask a Solar Provider Before Signing a Contract Solar Financing Options								
SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit sdge.com/privacy.								
Requesting Data please click on the second email notification received.								
A Notification From SDG&E Consent to Share Portal								
This message is to inform you that you may now contact SDG&E to obtain data or documentation for the authorized LOA. To request the data or documentation, please access the LOA by clicking You may also access this LOA by giging into Consent to Share by visiting www.sdge.com/loa and click on "Create a new LOA or Register as a Third-Party".								

Request ID: LOA-0000253021

If you have any questions or concerns, email us at <u>CIM@sdge.com</u>. Please do not reply to this email.

If you are a registered user, you can manage this LOA by visiting sdge.com/loa.

Thank you, SDG&E CIM

SDOGL CIM

Interested in solar?

If you have questions about installing solar on your home, the "California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar Consumer Protection Guide. The Guide includes important information on:

Available solar programs for income-qualifying customers
 False Claims to Watch Out For

- False Claims to Watch
 Your Rights
- Questions to Ask a Solar Provider Before Signing a Contract
 Solar Financing Options

Solar Financing Options

SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit sdae.com/privacy

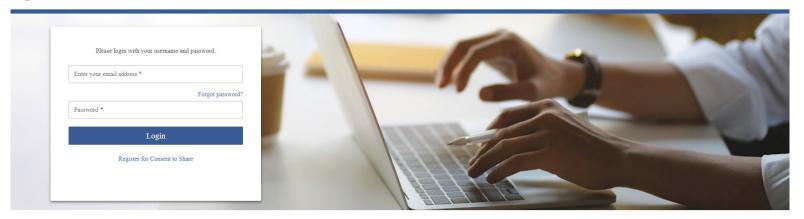


How to create a CISR-DRP LOA electronically

1. Choose Log in to the Portal from the <u>www.sdge.com/loa</u> website. Select Third Party Log in. Login using your Consent to Share application credentials.

SDGE"

Consent To Share



2. After logging in, click on 'Create LOA.'

J	SD	GE												Search Site	① Consent To Share
cts +	Crea	ate an LOA]												Export All LOAs
企	My (Open LOAs													
ର ଟ୍ର		C' Refre:	h												
ጽ (፻		Select	LOA ID	₹ LO	DA Status ∓	LOA Type \Xi	Purpose	÷	Submission = Process	LOA Create Date \Xi	Start Date ∓	End Date ∓	Customer First Name $\overline{\mp}$	Customer Last Name $\overline{\mp}$	Delegated Customer ╤ Email
														-	
ıl	ŀ	Cancel LOAs	Reject LOA	Update	Email										



3. A new screen will be displayed where you may identify yourself. Choose 'Demand Response Provider.'

ø	SDGE	Search Site O Consent To Share
cts	Create or Upload LOA	
B	l am the *	
$\hat{\Box}$	Demand Response Provider 🗸	
Q	I need authorization for the following program or reason *	
€)	Do you want to start a new LOA or upload a signed LOA?	
ጽ	Upload a signed LOA O Start a new LOA	
0		
	Close Create LOA	

4. Select the **purpose for your LOA**. If you are a Demand Response (DR) Provider, select '*', An LOA specific for the DR program will be created called a CISR-DRP. If any other option is selected, a Standard LOA will be initiated which is also called

9	SDGE	Search Site	① Consent To Share
CtS	Create or Upload LOA		î.
	I am the * O Demand Response Provider V		
Q	I need authorization for the following program or reason * ① Third Party Demand Response Program		
Ф **	Do you want to start a new LOA or upload a signed LOA? Upload a signed LOA Start a new LOA		
®	Close Create LOA		

Standard CISR.

5. By default, '**Start a new LOA**' will be selected. This will initiate the electronic process to create the LOA. If youalready have the signed LOA and wish to upload it, choose the option '**Upload a signed LOA**.' Then, click '**Create LOA**.'

9	SDGE" Consent To Share	F
cts	Create or Upload LOA	^
	lam the *	
	Demand Response Provider	
Q	I need authorization for the following program or reason *	
Ø	Do you want to start a new LOA or upload a signed LOA?	
ጽ	Uplead a signed LOA O Start a new LOA	
0		
	Close	



An online form will be displayed to fill out the necessary information for the LOA. Fields marked with '*' are mandatory to complete.

6. Enter the information in the Customer Contact Information section to the best of your knowledge. Important: The First Name and Last Name you enter in the form must match what the customer provided with SDG&E billing. You may find this information in customer's SDG&E bill on the top of any page. Mismatch in the name would fail SDG&E validation and the LOA may be sent back to you for correction which could delay the overall process. The customer may also update this information when they sign the LOA. SDG&E will be contacting the customer at this email address to get their signature. Please make sure to provide the correct email address.

S	SDGE				Search Site Consent To Share
cts	-	☆	Contact & Service Account Info		
ŧ	LOA Actions				Close Print Filled LOA Print All Added Service Accounts
	Purpose	Third Party Demand Response Program	Customer Contact Information		
Q	Start Date	-	Is this a Residential or Business Customer? *		
Ð	End Date Status	DRAFT	Residential	Business	Phone number *
ጽ	Created		Please provide a first name		Enter a 10 digit phone number
0	Details		Last Name * Please provide a last name]	Extension
			Email address *		
al			Please provide a valid email address		
٥			Confirm Email Address * Please confirm the email address		
æ			L		



- 7. Enter the **Service Address Information** if you would like to fill it out on behalf of the customer. This is an optional step for you. The customer must enter this information when they sign the LOA. You may add the service account using either of these options:
 - Add service account numbers one at a time by clicking 'Add account number.'. Then enter the details in the table displayed on the screen.
 - If you have many accounts to be added, download the template by clicking the link. Add your accounts in the template and save the file. Then upload the file by selecting '**Choose File**.'. After it is uploaded, click '**Upload Service Accounts**' to complete the upload.

9	SDGE								Search Site	Consent To Share
cts	•	ĥ	7	Service Address Information						
	LOA Actions -			Note: only include the first 10 or 12 digits, do not include any add						
Q	Purpose Start Date	Third Party Demand Response Program	A	+ Add account number Service Account Number	F	Row Count: 0 Service Address	Ŧ	Service City		Ŧ
Ð	End Date	DRAFT		No items						
ጽ	Status Created	DRAFT		If you have several account numbers to add, you may upload them						
?	Details			Click here to download the excel template. Add the service.	acco	count number information in the excel. Save the document on your local	comp	uuter.		
			В	Choose File No file chosen						
ul				Click "Bulk Upload Service Accounts" to complete the upload proc	tess a	s and to add the service account numbers to the LOA.				
Ô				Bulk Upload Service Accounts	_					





8. Now, review the Primary Third Party/DRP Contact Information which will be pre-populated. The basic information from your profile will be auto-populated for ease of use. Make sure to provide a valid email address as it will be used by SDG&E as the primary contact for all correspondence related to this LOA. The mailing address and phone number will be used as secondary contact information. It is also important to enter the correct Rule 32 ID.

8 ⊡ ≪	LOA Actions - Purpose Third Party Demand Response Program Start Date - End Date - Status DRAFT	Click Here to download the excel Hemplate. Add the service account number information in the excel. Save the document on your local computer. Click "Choose File" to select the excel file to upload. Choose File" No file chosen Click "Upload Service Accounts" to complete the upload process and to add the service account numbers to the LOA. Upload Service Accounts	
	Created	Primary Third Party / DRP Contact Information	
		Organization Name *	SDG&E Rule 32 ID *
		lines that	Please provide the Rule 32 ID for the Primary DRP
		Email address *	Phone number *
		an ananan. Agaat an	and the set of the
		Confirm Email Address *	Extension
		Please confirm the email address of the Third Party	
		L	

9. If you have a secondary DRP to be added to the same LOA, then choose '**Yes**' to the next question, otherwise choose '**No**.' Add secondary details, if required.

CtS			
CIS	🔁 - 🗘	None Mole	Please provide the Rule 32 ID for the Primary DRP
Đ	U	Email address *	Phone number *
~	LOA Actions ~	an attainmen Agratum	
		Confirm Email Address *	Extension
8	Purpose Third Party Demand Response Program	Please confirm the email address of the Third Party	
(11)	Start Date		
	End Date		
	Status DRAFT		
	Created	Will a secondary DRP/Agent need access to the customer data for this program? *	
-			
		O Yes	
		Secondary Third Party / DRP Contact Information	
		Secondary Third Party / DRP Contact Information Organization Name *	SDG&E Rule 32 ID
			SDG&E Rule 32 ID Please provide the Rule 32 ID for the Secondary DRP
		Organization Name *	
		Organization Name * Please provide the organization name for the Secondary DRP	Please provide the Rule 32 ID for the Secondary DRP
		Organization Name * Please provide the organization name for the Secondary DRP Email address *	Please provide the Rule 32 ID for the Secondary DRP Phone number *
		Organization Name * Please provide the organization name for the Secondary DRP Email address * Please provide the email address of the Secondary DRP	Please provide the Rule 32 ID for the Secondary DRP Phone number * Enter a 10 digit phone number
		Organization Name * Please provide the organization name for the Secondary DRP Email address * Please provide the email address of the Secondary DRP Confirm Email Address *	Please provide the Rule 32 ID for the Secondary DRP Phone number * Enter a 10 digit phone number
		Organization Name * Please provide the organization name for the Secondary DRP Email address * Please provide the email address of the Secondary DRP Confirm Email Address *	Please provide the Rule 32 ID for the Secondary DRP Phone number * Enter a 10 digit phone number
		Organization Name * Please provide the organization name for the Secondary DRP Email address * Please provide the email address of the Secondary DRP Confirm Email Address *	Please provide the Rule 32 ID for the Secondary DRP Phone number * Enter a 10 digit phone number
PK		Organization Name * Please provide the organization name for the Secondary DRP Email address * Please provide the email address of the Secondary DRP Confirm Email Address *	Please provide the Rule 32 ID for the Secondary DRP Phone number * Enter a 10 digit phone number



10. In the next screen, click '**Review Filled LOA'** to download the information you filled in the previous screen in the PDF format. Review the information thoroughly. Then read the **declare statement** displayed on screen and select the check box accordingly if you agree.

CIS	Contact & Service Account Info Legal Review		*
			Close Print Filled LOA Print All Added Service Accounts
Purpose Third Party Demand Response Program Start Date End Date Status DRAFT	Legal Review Review Filied LOA Review All Added Service Accounts		
Created		D THE STATEMENT BELOW *	rom any liability, claims, demand, causes of action, damages, or expenses resulting from the use onsent to the use of electronic authorization. (K Back Save and Close Submit
<form></form>	BRPP Important Sector N Y Important Sector N Important Sector N Important	FOR AUTHORIZATION USE ONLY HORIZATION (check only one option) continue and #=	Person P
	Au	thorized Signature of Customer Date Signed (mm/ds/y)	Demaid Response services. If submitted electronically, I hereby indicate my consent to the use of elect authorization.
(You can include additional service agreements by attaching a list to this form.)			Authorized Signature of DRP Date Signed (mm/dd/yyy
Page 1 of 3	Form 144-0820 Page 2 of 3	Form 144-0	Page 3 of 3 Form 144-08

11. Click '**Submit'** to generate the LOA ID. You may choose to '**Save and Close**' the LOA if you are not ready to sign it. If you save the LOA for later, you have 60 days to complete the signing process. After 60 days, the LOA will automatically expire, and you will have to create a new LOA



12. In the final **Review** screen, you will be asked to sign. Click '**Complete Review'** when done. <u>Important</u>: Make sure to click '**Accept**' after signing so the signature will be accepted by the application.

cts	👝 LOA-0000040177 😭	Contact & Service Account Info Legal Review Review and Sign		⊨→
Ð			_	l->
	LOA Actions -	Close Print Filled LOA Print All Added Service Accounts	Files & documents (0)	0
	Purpose Third Party Demand Response Program	Customer Contact Information		
	Start Date	Type Phone number	No items	
	End Date	Full Name		
	Status DRAFT Created	Email address		
	oreacted			
		Service Address Information		
		Service Account Number = Service Address = Service City =		
		Service Account number + Service Address + Service City +		1
		10 100		
		Primary Third Party/DRP Contact Information		
		Organization Name Rule 32 ID		
		Email address Phone number		
		Customer Authorizations		
		A finite room of A finite room and a finite room and a finite room of DRP. Begin today and continue until (mm/dd/yyyy) or until revoked by customer or DRP.		
		Begin today and continue until revoked by Customer or DRP		
		B SUMMARY OF INFORMATION AUTHORIZED TO BE RELEASED I, (1), authorize SDG&E to disclose to the above DRP(s) for the service accounts listed above and/or attached to this form: 1) customer		
		Information (e.g., service account number, service address, rate schedule), 2) up to 36 months of historical and ongoing electric meter data and/or monthly usage data, 3) current SDG&E demand response programs in which I am known to participate, and 4) the information identified in Section D of		
		Electric Rule 32.		
		C CHANGES YOU AUTHORIZE THE DRP TO MAKE ON YOUR BEHALF I, (), grant the above-referenced DRP(s) permission to request that SDG&E shorten the interval length of my electric meter(s), if		
		available, for the service accounts listed above and/or attached to this form, when the DRP has successfully registered such service accounts with the CAISO's Relevant Systems, If SDG&E is the Meter Service Provider.		
		I, (), also grant the above-referenced DRP(s) permission to revoke this authorization on my behalf. I understand that a revocation submitted by any party to this authorization shall revoke this authorization for all parties.		
		D CUSTOMER AGREEMENT		
		I, (), authorize the actions and changes to be made (or undertaken) by SDG&E as specified in this authorization. I understand that my information may be transmitted to the DRP(s) even after the authorization has ended to update to the data for the period during which this authorization		
		was valid. In all cases, this authorization will be automatically revoked for a service account when such service account is closed. I understand SDG&E reserves the right to verify any authorization request submitted before releasing information or taking any action on my behalf.		
		I, (i), understand and agree that if any of my service accounts listed herein are on Critical Peak Pricing (CPP), those service accounts will be scheduled to be unenrolled from CPP when those service account(s) are successfully registered in the CAISO's Relevant Systems by one of the		
		above DRPs. I agree to bear any resulting financial consequences, including without limitation, loss of bill protection, loss of existing reservations of capacity, or loss of incentives related to my participation in CPP.		
		If I am not the Customer or Record, I declare that I am authorized to execute this authorization on behalf of the Customer of Record listed at the top of		
		this form and I have authority to financially bind the Customer of Record.		
		I hereby release, hold harmless, and indemnify SDG&E from any liability, claims, demands, and causes of action, damages, or expenses resulting from: (1) any release of information to the DRP(s) pursuant to this authorization; (2) the unauthorized use of this information by the DRP(s) or any other third		
		party; and (3) any actions taken by a DRP pursuant to this authorization. I understand that I may revoke this authorization at any time by submitting a revocation request using this same form or authorized electronic process accepted by SDG&E. If submitted electronically, I hereby indicate my consent to the use of electronic authorization.		
		E PRIMARY DRP'S AGREEMENT REGARDING CUSTOMER RELEASE AUTHORIZATION		
		I, (I), hereby agree to comply with this agreement, and to release, hold harmless, and indemnify SDG&E from any liability, claims, demand, causes of action, damages, or expenses resulting from the use of customer information obtained pursuant to this authorization. If submitted		
		electronically, I hereby indicate my consent to the use of electronic authorization.		
		If someone else from your organization is required to sign this form, please check the box and provide the contact information of the authorized signatory. After you click		
		Submit, this person will receive an email with a link to provide their e-signature.		
		Electronic Signature - After signing please click 'Accept' before finishing the form. *		
		Electronic Signature - Atter signing please click Accept before finishing the form. *		
		Accept Clear		
		Date Signed		
		F SECONDARY DRP'S AGREEMENT REGARDING CUSTOMER RELEASE AUTHORIZATION I, (), hereby agree to comply with this agreement, and to release, hold harmless, and indemnify SDG&E from any liability, claims, demand, causes of		
		action, damages, or expenses resulting from the use of customer information obtained pursuant to this authorization. If submitted electronically, I hereby indicate my consent to the use of electronic authorization.		
		G JURISDICTION OF CPUC This authorization is subject to such modifications as the California Public Utilities Commission may direct from time to time in the exercise of its jurisdiction.		
		Close K Back Save and Close Complete Review		

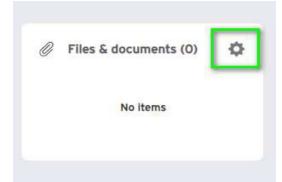


Important: Review all the information thoroughly before signing. If you would like to make any changes, please use the '**Back**' button at the bottom of the screen. You may also use the links provided at the top of the screen to navigate to a specific screen.

Cancel					« Back	Save and Close	Complete Review
Contact & Service Account Info	Legal Review	Review and Sign	1				
				Close	Print Filled LOA	Print All Added	Service Accounts

In the same screen, you may also upload any additional documents that you would like SDG&E to review. This is an optional step.

In the 'Files and documents' section on the right-hand side, click the gear icon.



Select the files you wish to upload.

All files uploaded he	e will be scanned by our system and can take up to 20 minutes for	other parties to view the file
	Q	
	<i>V</i>	
l	Drag and drop files here or	
	Select file(s)	



Select the category of the file you uploaded. Choose '**Other**' is none apply.

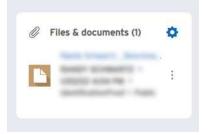
Attach file(s)							
All files uploaded here w	III be scanned by our system ar	nd can take up to 20 minutes for other parties to	o view the file.				
		A					
	Drag and drop files here						
		or Select file(s)					
Name *	File	Category	Classification				
Real Courses and	Tana conserv. And Tanaat	LOA Form Select LOA Form List of Service Accounts Identification Proof Property/Rental/Lease Agreem	Public V				
Cancel		Utility Bill Special Instructions Revoke Document Other	Submit				

Choose the classification for the attached file to determine who should be allowed to see the file.

Attach file(s)					VICE ACCOUNTS	Files & documents (0)	¢		
All files uploaded here will be	scanned by our system and can take up to	o 20 minutes for other parties to view	the file.			No items			
	Q	•							
	Drag and drop files here								
	Select	file(s)							
Name *	File	Category	Classification	2 C	Ŧ				
Randy Schwartz_Benci	Randy Schwartz _ Benchmarking_Full Paper.pdf	Identification Proof	Y Public Y	Private - Documents Public - Documents	in this classification will in this classification will b	e viewable to you and SDG&E only. e viewable to all users with access to this	LOA case.		
Cancel				Submit					



Once you click 'Submit,' you will see the file under the Files and Documents section.



On some occasions, you may want someone else to sign the LOA on your behalf. Select the checkbox provided above the signature box. Provide the email address where SDG&E will send the LOA to be signed. Note that the authorized signatory will not be allowed to edit any information in the LOA.

Electronic Signature						
If someone else from your organization is required to person will receive an email with a link to provide the	o sign this form, please check the box and provide the contact information of the authorized signatory. After you click Submit, this eir e-signature.					
Email address *						

13. After you sign and click '**Complete Review**,' an acknowledgment screen will be displayed. You will see that the LOA is now in the waiting status for the customer to sign. You can no longer make changes to the LOA. You may download a copy of the LOA for your reference using the '**Print'** button at the top of the screen or from the **Files and Documents**.

🥪 SDGE Consent To Share Search Site CtS LOA-0000261006 9 Thank you. We have received your information and will contact you if we have any questions or to provide you with further instructions if necessary. We recommend you print your LOA with the 'Print Filled LOA' Button below for future reference. You may close this browser window at your convenience. $|\rightarrow$ Files & documents (2) Close Print Filled LOA Print All Added Service Accounts LOA-0000261006_KarenFish 6/25/24 10:41 AM • Customer Information LOAForm • Public Organization Name Туре Third Party Signature LOA Actions r Title Full Name ----6/25/24 10:40 AM · Purpose Third Party Demand Response Program Email address 2 Phone number -----Start Date Extension Customer Signed Date End Date PENDING-CUSTOMER SIGNATURE Service Account Information Details Service Account Number = Service Address = Service City Ŧ No items Primary Third Party/DRP Information Full Name Organization Name -Email address 1 Rule 32 ID Phone number Primary Third Party/DRP Signed Date Extension



14. You will receive an email with the confirmation along with the LOA ID. Please use this ID in all your future correspondence with SDG&E related to this request.



SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit sdge.com/privacy.

You have now completed the submission process for the LOA. The customer will receive an email requesting to sign the LOA. After they sign, the LOA will be validated and activated by SDG&E. When the LOA is activated, you will receive an email with the executed LOA for your recordkeeping. If there were any issues during validation, you will be notified about the next steps.

A Notification From SDG&E Consent to Share Portal

Request ID : LOA-0000040175

A Letter of Authorization (LOA) to share customer information of with you has been validated and the request is now active. This means you are now eligible to receive the customer's information as authorized in the LOA. A copy of the LOA has been attached for your records.

Depending on the program for which the LOA was intended, you should be receiving the data shortly. If you have any questions or do not receive your data in the next several days, please contact your SDG&E representative or SDG&E Third Party Demand Response Programs at cisr-dro@sdge.com. Please do not reply to this email.

If you are a registered user, you can manage this LOA by visiting If you are a registered user, you can manage this LOA by visiting sdge.com/loa.

Thank you, SDG&E CIM

Interested in solar?

If you have questions about installing solar on your home, the "California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar Consumer Protection Guide". The Guide includes important information on:

- · Available solar programs for income-qualifying customers
- False Claims to Watch Out For
- Your Rights
- Questions to Ask a Solar Provider Before Signing a Contract
- Solar Financing Options

SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit sdge.com/privacy.



How to create a Non-Standard LOA electronically

1. Choose Log in to the Portal from the <u>www.sdge.com/loa</u> website. Select Third Party Login. Log in using your Consent to Share application credentials.

SDGE"

Consent To Share



2. After logging in, click ' Create LOA.'

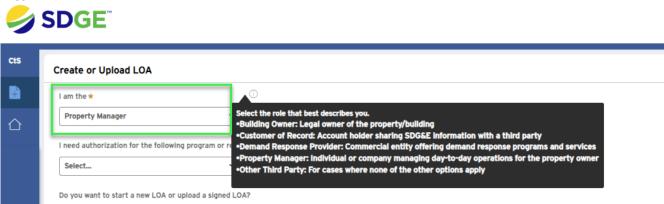
ts	eate an LOA	1											Export All LOA
	Open LOAs												
	C Refre	sh											
	Select	LOA ID 👳	LOA Status 👳	LOA Type 🐺	Purpose =	Submission Ţ Process	LOA Create Date 🐺	Start Date ₹	End Date 👳	Primary Third Party/DRP ╤ First Name	Primary Third Party/DRP ╤ Last Name	Secondary Third Party/DRP ╤ First Name	Secondary Third Party/DRP ╤ Last Name
			Annes and wants	-	(Webselful)	factors.		-	-	140	The last		
			feature to be relative	-	(Industriality)	-		-	-		100100		
			-	1000110	(In Sectors Int.	-	-		-	-	100100		
			Teams, 10002, 100020	-	on destruction	100100		-	-	-	-		
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5			1000 cm		factors bear barren hares	-		-					



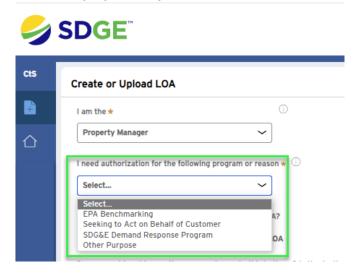
3. A new screen will be displayed where you may identify yourself. Note: You cannot submit a non-standard LOA if you are a Demand Response (DR) Provider.



4. Note: If you require clarification on the respected field, you may hover over the i-bubble (CSS tooltip) to view a description list.



5. Select the **purpose for your LOA**.



SDGE[®]

Consent to Share User Manual

6. Note: If you require clarification on the respected field, you may hover over the i-bubble (CSS tooltip) to view a description list.

	Create or Upload LOA	
	I am the *	D
	Property Manager 🗸 🗸	
	I need authorization for the following program or reason	
l	Seeking to Act on Behalf of Customer 🗸	Select the primary purpose of the LOA
l		EPA Benchmarking: Measures energy performance for a building
l	Do you want to start a new LOA or upload a signed LOA	Seeking to Act on Behalf of Customer: Represents the Customer on authorized SDG&E actions
l	O Upload a signed LOA Start a new L	SDG&E Demand Response Program: Allows participation in an SDG&E Demand Response Program to manage electric energ
l	I want to upload a *	Other Purpose: For cases where none of the other options apply
L	Select	

7. Select 'Upload a signed LOA' to create the Non-Standard LOA. By default, 'Start a new LOA' will be selected.

9	SDGE	Search Site	Onsent To Share
CtS	Create or Upload LOA		•
÷	I am the * ①		
\triangle	Property Manager		
	l need authorization for the following program or reason \star 🛈		
	Seeking to Act on Behalf of Customer		
	Do you want to start a new LOA or upload a signed LOA?		
	Upload a signed LOA Start a new LOA		
	I want to upload a *		
	Select 🗸		
	Close		



8. Select 'Signed Non-Standard LOA' from the next dropdown and click 'Submit.'

Create or Upload LOA		
I am the *	May 19, 2023	AUTHORIZATION TO: RECEIVE CUSTOMER INFORMATION OR ACT ON A OUSTOMER'S REHAU
Property Manager	Br: Limited Power of Attorney	NEX CONTINUES DEVICE NEX CONTINUES DEVICE America Sectors
	To When It May Cescent:	-
I need authorization for the following program or reason * ① Seeking to Act on Behalf of Customer	Character price register The control of the register of the registero	 A set of the set of
Do you want to start a new LOA or upload a signed LOA? Upload a signed LOA Start a new LOA	In a second Every four float functionation, and using the Ability to tropert events when the float program Second and the Second and the Second and the Second and the Second Ability of t	 an ensure as a second se
I want to upload a *	Charantee measures that they get out it is the of head near the section of and authorized to de boardware as the form of Charleman. Charantee heady authorized to you also a section of a section of the provider, so related and their the	 Bessel of a segretable service service of gamma and contract service of the service service of the service service of the service service service of the service service
Signed Non-Standard LOA Select Signed CISR Form - 185-1000	 all of the data set association and an antibulation and an antibulation of the data set as a set at a set as a set at a set a	Particular at least of constructions is an end of the second
Signed Non-Standard LOA	The Listend Device of Advances shall be valid indefinitely them is the data shall and and involved and by Contamer and that apply in and its contemportant hard and apply the Device and apply context, and a for surrougher any additioned information is ender to comply with this request, please do not builde to context.	1 Named and reads or display of joints on ity constrain and its of the set of the
	Thank you in advance for your cooperation.	² The strilly adapted as social current information adhead heap at the local stall work participant and integration to stringer, the rest is social to support the space.
	Sincerely,	Contraction of the second s

- 9. An online form will be displayed to fill out the necessary information for the LOA. Fields marked with '*' are mandatory to complete.
- 10. Enter the information in the **Customer Contact Information** section to the best of your knowledge. Make sure to provide a **valid email address**. This email will be used by SDG&E as the primary contact for all correspondence related to this LOA. The **mailing address and phone number** will be used as secondary contact information. Enter the **date when the customer signed the authorization**. This could be a date in the document/agreement you plan to attach or today's date. This cannot be a future date.

<u>Important</u>: The **First Name** and **Last Name** entered must match the billing information associated with the SDG&E customer. You can find this information on the customer's monthly SDG&E bill. Any discrepancies in the name may result in SDG&E validation failure, and the Letter of Authorization (LOA) could be returned to you for correction, potentially causing delays in the overall process.

🔁 - 🗘	Contact & Service Account Info	
		Close
LDA Actions - Purpose EPA Benchmarking Start Date End Date Starts DRAIT Created	Customer Contact Information Is this a Residential or Business Customer # Residential First Name # Please provide a first name Last Name # Please provide a last name Date Customer Signed # Immer a 10 digit number	Mailing Country United States of America Mailing Address Please provide street number and street name Mailing City Please provide the city Mailing State / Province CA Mailing Zip Please provide the zip Email address Please provide and address Cortern Email address Please confirm the email address
	LOA Actions + Purpose EPA Benchmarking Start Date End Date Status DRAFT	LOA Actions - Customer Contact Information Purpose EPA Benchmarking Start Date End Date Status DBATT Created First Name * Please provide a list name Data Please provide a list name Data Customer Signal * Phone number



- 11. Enter the **Service Address Information.** Provide all the service accounts under customer's name for which you would like to get authorization. You may add service accounts using either of these options:
 - a. Add service account numbers one at a time by clicking 'Add account number.' Then enter the details in the table displayed on the screen.
 - b. If you have many accounts to add, download the template by clicking the link. Add your accounts in the template and save the file. Then upload the file using 'Choose File.' After it's uploaded, click 'Upload Service Accounts' to complete the upload.

9	SDGE	74		Search Site Consent To Share
CtS	• -	☆	Service Address Information	
÷	LOA Actions		Click "Add account number" to add Service Account Numbers to this LOA. The service account number can be found on the monthly bill. Note: only include the first to or 12 digits, do not include any additional digits, spaces, dashes, or periods.	
仚	Purpose	Third Party Demand Response Program	A + Add account number Row Count: 0	
Q	Start Date		Service Account Number 👳 Service Address 👳 Service City	Ŧ
Ø	End Date		No items	
ጽ	Status Created	DRAFT	If you have several account numbers to add, you may upload them in bulk using the excel template provided below.	
0	Details		X Click here to download the excel template. Add the service account number information in the excel. Save the document on your local computer.	1
			Choose File No file chosen	
ul			Click "Bulk Upload Service Accounts" to complete the upload process and to add the service account numbers to the LOA.	
Ô			Bulk Upload Service Accounts	

12. Now, review the **Primary Third Party/DRP Contact Information** which will be pre-populated. The basic information from your profile will be auto-populated for ease of use. Provide a **valid email address** as it will be used by SDG&E as the primary contact for all correspondence related to the LOA. The **mailing address and phone number** will be used as secondary contact information. Also, choose the **method of data disclosure**.

CtS	- 4	Primary Third Party / DRP Contact Information	
8	0	Organization Name Mailing Cour	ntry
$\hat{\Delta}$	LOA Actions -	United Star	ates of America 🗸 🗸
<u> </u>	Purpose EPA Benchmarking	First Name * Mailing Addr	ress
8	Start Date	feats down	
	End Date	Last Name \star Mailing City	
	Status DRAFT	1000	
	Created	Date Third Party Signed * Mailing State	e / Province
		A)	~
		Phone number Extension Mailing Zip	
		Email addres	\$\$
		and the	and the second
		Confirm Ema	all Address
		Please con	firm the email address of the Third Party
		The Utility will provide the information requested above, to the extent available, via any one of the following. My (Agent) preferred format	tic (Chark all that anniuna)
		Hard copy via US Mail (if applicable)	t a concession concerning provide
		Hard copy via US Mail (If applicable)	
		Electronic format via electronic mail (if applicable) to this e-mail address:	
		Facsimile at this telephone number:	
РК			
		Close	Save and Close Next

Note: If the email address included within the LOA is different than the email address used to register for Consent to Share, LOA's will not appear on your **CtS** main dashboard.



13. In the next screen, you may provide specific authorizations that the customer has authorized by providing your initials in the respective boxes. If you do not find a relevantoption, initial **Option 9** and provide the authorization description. You may provide more than one authorization by initialing all the relevant boxes.

cts	• -	Contact & Service Account Info Customer Actions Authorized
B		Close
$\hat{\mathbf{O}}$	LOA Actions -	
	Purpose EPA Benchmarking	Customer Actions Authorized
	Start Date	Please review and initial the required boxs. (Must initial at least one) *
	End Date	This authorization provides authority to the Agent. The Agent must thereafter provide specific written instructions/requests (cernal is acceptable) about the particular account(s) before any information is released or action is taken. In certain instances, the requested act of truttorin may result incort to you, the customer, Requested for information may be inlined to the most recent 12 months predid.
	Status DRAFT	1. Request and receive billing records history and all meter usage data used for bill calculation for all of my account(s), as specified herein, regarding utility services furnished by the Utility
	Created	L request and receive billing records nistory and all meter usage data used for bill calculation for all oil my account(s), as specified nerein, regarding utility services turnished by the Utility
		2. EPA Benchmarking (authorizes usage information to be uploaded to the EPA's ENERGY STAR Portfolio Manager®)
		3. Request and receive copies of correspondence with my account(s) concerning (initial all that apply)
		4. Request investigation of my utility bill(s)
-		5. Request special metering, and the right to access interval usage and other metering data on my account(s)
-		6. Request rate analysis
		7. Request rate changes
		B. Request and receive verification of balances on my account(s) and discontinuance notices.
		0. Other acts and functions (please specify)



14. In the same screen, you may also specify the duration for which the LOA should be considered valid. You can either give a specific end date or choose '**Until Customer Revokes**.'

9	SDGE		Search Site	nsent To Share
cıs	LOA-0000261007 ☆	Contact & Service Account Info Customer Actions Authorized	_	→
	LOA Actions - Purpose Seeking to Act on Behalf of Customer Start Date End Date	Customer Actions Authorized Please review and Indicate the actions authorized by your document. (Must mark at least one) I. Request and receive billing records history and all meter usage data used for bill calculation for all of my account(s), as specified herein, regarding utility services furnished by the Utility	Files & documents (O No items	» ¢
	Status DRAFT Created Details	A Repark with Centre and y new an intervent warge card ware for an advancement of an only sectore and the particular sectore and the centre of a centre of the centre		
		A. Request and receive copies of correspondence with my account(s) concerning (initial all that apply) A. Request investigation of my utility bill(s)		
		5. Request special metering, and the right to access interval usage and other metering data on my account(s)		
		6. Request rate analysis		
		B. Request and receive verification of balances on my account(s) and discontinuance notices.		
		9. Other acts and functions (please specify) Timeframe of Authorization		
		Start Date * End Date * Start Date * Star		
		Would you like to make a data request or include special instructions with this LOA? Ytes, I would like to request data or provide special instructions now. No, data will be requested later.		
		Please click the "Attach Document(s)" button to upload the non-standard LOA. Attach Document(s)		
		Cancel K Back Save and Close Submit		

15. By default SDG&E will send the last 12 months of data to the Third Party unless a specific range is required or unless you tell us otherwise. Use the checkbox provided at the bottom of the screen to provide the specific range for which the data is being requested.

Please check here if you w	rould like to select a timeframe for the data being shared. By default SDG&E will send the last 12 months of data to the Third Party unless a specific range is required, or unless you tell us otherwise.
From *	To *



The screen also provides you an option to enter special instructions to SDG&E related to this LOA. Use the radio button options at the bottom of the page for this. The instructions you enter here are not shared with the customer. This information is later viewed by SDG&E only.

Would you like to make a data request or include special instructions with this	s LOA?
O Yes, I would like to request data or provide special instructions now.	No, data will be requested later.
If you need to include a data request or special instructions, please type then	n in the box below.
The box below is for entering data requests or special instructions. Examples 500 characters.	of data requests or special instructions can include: waiting a specific period of time before sharing data; requesting that data be shared in a specific format; etc. You may enter up to
Data Request or Special Instructions *	

- 16. In the next screen, you will be asked to upload the fully executed agreement/document. If the relevant authorizations are not present in the attachment, the LOA may get rejected by SDG&E. Click 'Attach Documents.'
 - a. Note: Please use this section to upload property management agreements, letterheads, or any additional documents.

9	SDGE	Search Site
cts	LOA-0000261007 🟠	Would you like to make a data request or include special instructions with this LOA? Yes, I would like to request data or provide special instructions now. No, data will be requested later.
 □ 0 0 	LOA Actions - Purpose Seeking to Act on Behalf of Customer Start Date End Date	Please click the "Attach Document(s)" button to upload the non-standard LOA. Attach Document(s)
~~ ?	Status DRAFT Created	Cancel K Save and Close Submit

Select the files you wish to upload.



Attach file(s)

 \times

All files uploaded here will be scanned by our system and can take up to 20 minutes for other parties to view the file.

Drag and drop files here
or
Select file(s)

Cancel

Attach



Select the category of the file you uploaded. Choose '**Other**' is none apply.

Attach file(s)				\times
All files uploaded here wil	II be scanned by our s	system and can take up to 20 minutes for other	parties to view the file.	
		Drag and drop files here		
L		or		.1
		Select file(s)		
Name *	File	Category	Classification 🚯 🚯	
		LOA Form ~ Select LOA Form List of Service Accounts Identification Proof	Public ~	
Cancel		Property/Rental/Lease Agreements Utility Bill Special Instructions Revoke Document Other	Attact	

Choose the classification for the attached file to determine who should be allowed to see the file. Attach file(s)

All files uploaded here will be scanned by our system and can take up to 20 minutes for other parties to view the file.

		6		
		Drag and drop files here		
		or Select file(s)		
Name *	File	Category	Classification	
	SeaWorld Parks & Entertainment, Incpdf		Public Select	0
	you ar blic - Documents in th	this classification will be nd SDG&E only. nis classification will be vie access to this LOA case.	ewable to	tach



17. After you click **Submit**, you will see the file under the **Files and Documents** section on the right-hand side.

9	SDGE		Search Site Conse	ent To Sha
cts	🗧 LOA-0000261008 🔄	Contact & Service Account Info Customer Actions Authorized		→
	LOA Actions ~	Close	Files & documents (1)	¢
Q	Purpose Seeking to Act on Behalf of Customer Start Date End Date Status DRAFT	Customer Actions Authorized Please review and Indicate the actions authorized by your document. (Must mark at least one) * I. Request and receive billing records history and all meter usage data used for bill calculation for all of my account(s), as specified herein, regarding utility services furnished by the Utility	Standard CISR_0 (1) Karen Fisher • 6/25/24 12:22 PM • LOAForm • Public	:
	Created Details	2. EPA Benchmarking (authorizes usage information to be uploaded to the EPA's ENERGY STAR Portfolio Manager®)		
		3. Request and receive copies of correspondence with my account(s) concerning (initial all that apply)		
		4. Request investigation of my utility bill(s)		
		5. Request special metering, and the right to access interval usage and other metering data on my account(s)		
		6. Request rate analysis		
		7. Request rate changes		
-		8. Request and receive verification of balances on my account(s) and discontinuance notices.		
		9. Other acts and functions (please specify)		
		Timeframe of Authorization		
		Start Date * End Date * 646/2024 Imit 646/2024 Imit Please check here if you would like to select a timeframe for the data being shared. By default SDGEE will send the last 12 months of data to the Third Party unless a specific range is required, or unless you tell us otherwise.		
		Would you like to make a data request or include special instructions with this LOA? Yes, I would like to request data or provide special instructions now. No, deta will be requested later.		
		Please click the "Attach Document(s)" button to upload the non-standard LOA. Attach Document(s)		
		Cancel K Back Seve and Close Submit		

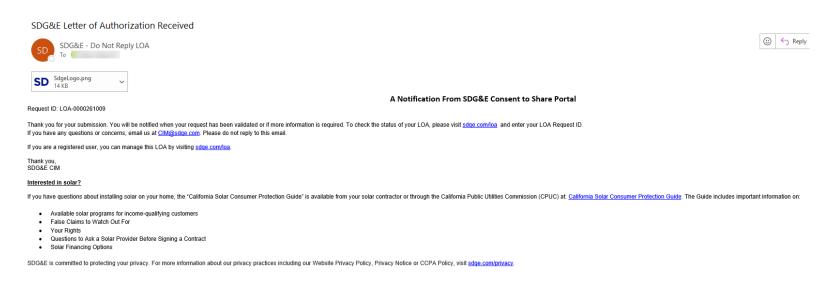
18. After clicking 'Submit,' an acknowledgment screen will appear. The LOA will now be in a waiting status for SDG&E validation, and you won't be able to make further changes. Unlike standard CISR and CISR-DRP LOAs, these non-standard requests do not require electronic customer signatures, assuming the agreement or document you uploaded in the previous step sufficiently grants authorizations.



cts	😑 LOA-0000041135 🗘	Thank you. We have received your your convenience.	information and will contact yo	u if we have any questions o	r to provide you with further in	structions if necessary. You may close this browser window at		→
	LOA Actions -					Close	Files & documents (1)	٥
	Purpose EPA Benchmarking Start Date	Customer Information					Martin Science 1	
	End Date	Туре	terror of the second se		Full Name	AND COMPANY	Littles - halo	
	Status PENDING-SDG&E VALIDATION	Email address	proceeding and one		Phone number	20-002-022		
	Created	Mailing Address	dali in sua Tananata, in suran		Extension			
	Details	Customer Signed Date	inclusion					
		Service Account Informa	tion					
						🖉 Fields 🛛 📿 Refresh		
		Service Account Number	Ŧ	Service Address	Ŧ	Service City $\ensuremath{\overline{=}}$		
				-		area.		
		Primary Third Party/DRP	Information					
		Full Name	same same		Organization Name			
		Email address	and a state of the	-	Mailing Address			
		Phone number			Primary Third Party/DRP Si			
		Extension			Date			
		LOA Case Information						
		LOA Type	Non Standard		Start Date			
		Submission Process	Electronic		End Date	10.000		
		Purpose of LOA	EPA Benchmarking		Resolved Date	**		
		Purpose of LOA (Details)	EPA Benchmarking		Revoked Date	-		
		Data Disclosure Informat	ion					
		Frequency/Period	Multiple		Data Disclosure Method	Email		
RS		Data Elements to Disclose	EPA Benchmarking		Additional Details	an other stress charactures		
		Other Acts and Functions	100		Data Disclosed?	No		
م 🗄	Type here to search O 🛱	0 🖬 🧿 🔿						47 PM 11/2022

19. You will receive an email with the confirmation along with the LOA ID. Please use this ID in all your future correspondence with SDG&E related to this request.





You have now completed the submission process for the LOA. After the LOA is validated and activated by SDG&E, you will receive an email. If there were any issues during validation, you will be notified about the next steps.

SDG&E Letter of Authorization Active	
SDG&E - Do Not Reply LOA To Retention Policy: Sempra Default Inbox Retention (60 days)	🙂 🕤 Rep
SD 312 KB Signed LOA.PDF List of Service Accounts.XLSX KB KB	

A Notification From SDG&E Consent to Share Portal

Request ID : LOA-0000253021

A Letter of Authorization (LOA) to share your data with has been validated and the LOA is now active. This means the third party you authorized is now eligible to receive your utility information as authorized by you in the LOA. A copy of the LOA has been attached for your records.

If you have any questions or concerns, email us at CIM@sdge.com. Please do not reply to this email.

If you are a registered user, you can manage this LOA by visiting sdge.com/loa.

Thank you, SDG&E CIM

Interested in solar?

If you have questions about installing solar on your home, the "California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at. <u>California Solar Consumer Protection Guide</u>. The Guide includes important information on:

- Available solar programs for income-qualifying customers
- False Claims to Watch Out For
 Your Rights
- Questions to Ask a Solar Provider Before Signing a Contract
- Solar Financing Options

SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit sdge.com/privacy.



How to upload a signed LOA

1. Choose Log in to the Portal from the <u>www.sdge.com/loa</u> website. Select Third Party Login. Use your Consent to Share application credentials.

SDGE"

Consent To Share



2. After logging in, click ' Create LOA.'

Create	an LOA]											Export All LC
Му Оре	en LOAs												
1	C' Refre	sh											
	Select	LOA ID 👳	LOA Status 👳	LOA Type 葉	Purpose \mp	Submission Ţ Process	LOA Create Date 후	Start Date ╤	End Date 葉	Primary Third Party/DRP ╤ First Name	Primary Third Party/DRP ╤ Last Name	Secondary Third Party/DRP ╤ First Name	Secondary Third Party/DRP ╤ Last Name
			-	Sec. 108	(Without experime	Server.	-	-	-	140	they have		
			Product (1998) (1998)	-	(Independently)	-					100700		
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			Texts (1000) 10000	-	and descention.	-				-	-		
			Andrew Street Telephone	No. Toronto d	(The Baseline and The	-	1010	-		-			
			1040 a 1010 a 1010	-	(Webserson)	-				-	Teachers.		
			-	-	Philippine and Philip	-		-	-				
			Name and America		factors, local Name Pract	-		-	-				



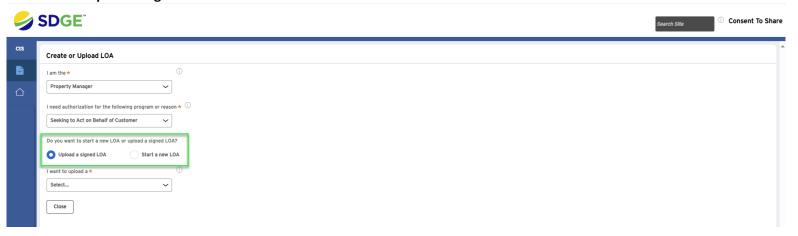
3. A new screen will be displayed where you may identify yourself.

<i>S</i>	SDGE	Search Site Consent To Sha
cts	Create or Upload LOA	
÷	Tam the *	
	Property Manager Select Building Owner Demand Response Provider Compary Manager Other Third Party Customer of Record LoA Agent Iwant to upload a signed LOA Select	
	Close	

4. Select the **purpose for your LOA**.

9	Search Site Consent To Share			
cts	Create or Upload LOA			
	I am the * 0 Property Manager V			
	I need authorization for the following program or reason * Seeking to Act on Behalf of Customer Seict PA Bonchmarking Solid& Demain Response Program Other Purpose Select Select Close			

5. Select 'Upload a signed LOA.'





6. Select 'Signed CISR Form 185-1000' or 'Signed CISR-DRP Form' from the next dropdown.

9	SDGE Consent To Share							
8	Create or Upload LOA I am the Property Manager I need authorization for the following program or reason F need authorization for the following program or reason F need authorization for the following program or reason O you want to start a new LOA or upload a signed LOA? F upload a signed LOA F start a new	<form></form>	<image/> <image/>	<section-header><section-header><section-header><section-header><text><text><text><text><text><list-item><list-item><list-item><list-item><list-item><list-item><list-item><list-item><list-item><list-item><text><text><text><text></text></text></text></text></list-item></list-item></list-item></list-item></list-item></list-item></list-item></list-item></list-item></list-item></text></text></text></text></text></section-header></section-header></section-header></section-header>				
	Close Submit							

 Click 'submit' to upload the signed PDF. Please click the "Add Supporting Document" icon to upload the signed LOA. If needed, you can also include a list of account numbers along with their associated service addresses in the Excel template provided below.

9	SDGE	
CtS	Upload LOA	
Ð	Please click the "Add Supporting Document" icon to upload the signed LOA. If needed, you can also include a list of account numbers along with their associated service addresses in the Excel template provided below.	
	Service Account excel template	LOA 1
	You may upload 2 files per LOA and file size may not exceed 5 MB per LOA.	C Add Supporting Document
		File Name File Type
	To upload another LOA, please click the "Add LOA" button.	
	Add LDA	
	Email * ①	
	Confirm Email	
	Submit	

You may upload 2 files per grid and file size may not exceed 5 MB per grid. Allowed file types include .pdf, .jpg, .jpeg, .doc,.docx, .xls, .xlsx and .csv.



8. Click 'Choose File' and an upload wizard will be displayed.

Add document to LOA	×
File Name Choose File I o file chosen	
Cancel	Submit

9. After uploaded, click 'Submit.'

Add document to LOA	×
File Name Choose File Rule32 (3).pdf	
Cancel	Submit



10. The uploaded document will be added to the grid.

ad LOA	
ase click the "Add Supporting Document" icon to upload the signed LOA. If needed, you can also include ount numbers along with their associated service addresses in the Excel template provided below. Service Account excel template	a list of
may upload 2 files per LOA and file size may not exceed 5 MB per LOA.	Add Supporting Document
	File Name File Type
	pdf
pload another LOA, please click the "Add LOA" button.	
Add LOA	
ali * ①	
firm Email	

- 11. Repeat **steps 6 thru 9** to add any supporting documents to the LOA.
- 12. If you would like to upload another LOA for the same purpose but for a different third party, select 'Add LOA.'

SDGE SDGE © Consent To SH						Consent To Share		
CtS	Upload LOA							î
Ð	Please click the "Add Supporting Document" icon to upload the signed LOA. If needed, you can also include a list of account numbers along with their associated service addresses in the Excel template provided below.							
	Service Account excel template	LOA 1			LOA 2			_
Q	You may upload 2 files per LOA and file size may not exceed 5 MB per LOA.	E Add Supporting Document			Add Supporting Document	🗑 Remove LOA		
Ø								_
8		File Name	File Type		File Name	File Type		_
		Rule32 (3)	pdf 🧃					_
?								_
al	To upload another LOA, please click the "Add LOA" button.							
Ô	Add LOA							
œ	Email *							
	Confirm Email							
	Submit							



13. A new grid will be displayed to add the new LOA and supporting documents.

9	Scared Sile Consent To Share					
cts	Upload LOA					
Ð	Please click the "Add Supporting Document" icon to upload the signed LOA. If needed, you can also include a list of account numbers along with their associated service addresses in the Excel template provided below.					
	Service Account excel template	LOA 1	LOA 2			
۹	You may upload 2 files per LOA and file size may not exceed 5 MB per LOA.	C Add Supporting Document	C Add Supporting Document			
Ø		File Name File Type	File Name File Type			
*		Rule32 (3) pdf				
0						
dl	To upload another LOA, please click the "Add LOA" button.					
۵	Add LOA					
60	Email *					
	SdmK					

14. Enter **email** address for current user. **Note:** This email address is used solely for uploading purposes and is not associated or linked with any contact information found within the LOA.

Ŋ	Sarch Site Consent To Share					
cts	Upload LOA					Î
Ð	Please click the "Add Supporting Document" icon to upload the signed LOA. If needed, you can also include a list of account numbers along with their associated service addresses in the Excel template provided below.					
	Service Account excel template	LOA 1		LOA 2		- 1
Q	You may upload 2 files per LOA and file size may not exceed 5 MB per LOA.	Add Supporting Document		Add Supporting Document	Remove LOA	- 1
€		File Name	File Type	File Name	File Type	- 1
		The North	pdf	T THE FOULT	pdf	- 1
						- 1
						- 1
al	To upload another LOA, please click the "Add LOA" button.					- 1
٥	Add LOA					- 1
60	Enail * Coofirm Enail					
	Submit					- 1



15. Click 'Submit' when all documents are uploaded.

Starch Stor Consent To Share					
cts	Upload LOA				
£	Please click the "Add Supporting Document" icon to upload the signed LOA. If needed, you can also include a list of account numbers along with their associated service addresses in the Excel template provided below.				
	Service Account excel template	LOA 1	LOA 2		
Q	You may upload 2 files per LOA and file size may not exceed 5 MB per LOA.	C Add Supporting Document	Add Supporting Document Remove LOA		
€					
8		File Name File Type pdf II	File Name File Type pdf @		
0					
ul	To upload another LOA, please click the "Add LOA" button.				
Ô	Add LOA				
88	Email * ①				
	Confirm Email				
	Submit				
			I		

16. A confirmation message will be displayed. You have not completed the submission for your signed LOA. After validation by SDG&E, the LOA will be activated.

9	SDGE	Search Site ① Consent To Share
CtS	Thank you. We have received your information and will contact you if we have any questions or to provide you with further instructions if necessary. You may close this browser window at your convenience.	•
÷		



Signing an LOA initiated by the customer (Snap start process)

- 1. When a customer initiates an LOA, you will receive an email requesting review and signature of the LOA.
- 2. There are 3 methods you can sign the LOA:
 - a. Click on the email link
 - b. Log in to CtS
 - c. Print the LOA and sign

Option A - Click on the email link

1. Click on the link provided in the email.

SDG&E Letter of Authorization Requires Your Action D Inbox *

do-not-reply-loa@sdge.com

☆ **◆**

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A Notification From SDG&E Consent to Share Portal

Request ID: LOA-0000040173

A Letter of Authorization (LOA) to share utility information with you has been initiated by . To enter your information and accept this request, or to reject this request, please access the LOA by clicking here.

If you have any questions or concerns, email us at <u>CIM@sdge.com</u>. Please do not reply to this email.

If you are a registered user, you can manage this LOA by visiting If you are a registered user, you can manage this LOA by visiting sdge.com/loa

Thank you, SDG&E CIM

Interested in solar?

If you have questions about installing solar on your home, the "California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar Consumer Protection Guide. The Guide includes important information on:

- Available solar programs for income-qualifying customers
- False Claims to Watch Out For
- Your Rights
- Questions to Ask a Solar Provider Before Signing a Contract
- Solar Financing Options

SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit sdge.com/privacy.



2. The LOA will be displayed for you to review and sign. Review/modify the third-party information. You may only review customer information and service account information. If any changes are required, please reach out to the customer to do so.

Contact & Service Account Info				→
			1	
LOA-0000040173		Print Filled LOA Print All Added Service Accounts Reject LOA	Files & documents (1)	¢
Customer Contact Information				I
Is this a Residential or Business Customer?				
First Name		Mailing Country		
Telephone and the second secon		tomo hasa of sources		
Last Name		Mailing Address		
Email address		Mailing City		
		Houring with		
Phone number	Extension	Mailing State / Province		
100-000-0000				
		Mailing Zip		
Service Address Information				
Service Account Number				
000017000				
Primary Third Party / DRP Contact Information				
Organization Name *		Mailing Country *		
annan:				
First Name \star		Mailing Address *		
1000		1000		
Last Name *		Mailing City *		
1000		(del)		
Email address *		Mailing State / Province *		
air othar most fignation		· · · · · · · · · · · · · · · · · · ·		
Confirm Email Address *		Malling Zip *		
an obtain thear. Republic to		1001		
Phone number *	Extension			
10 00 000				
The Utility will provide the information requested above, to the extent	available, via any one of the following. My (Agent) preferred format is	s (Check all that apply):*		
Hard copy via US Mail (if applicable)				
Electronic format via electronic mail (if applicable) to this e-mail	address:			
Email address *				
an effortation Republican				
Re-Enter Email Address *				
an athle than its and				
Facsimile at this telephone number:				
Close		Save and Close Next		



3. After you click '**Next**' in the subsequent screen, you will see the authorizations that the customer has initialed. You may also see the duration of the LOA.

Contact & Service Account Int	Customer Actions Authorized	
LOA-0000254010	Print Filed LDA Print All Added Service Accounts Reject LDA	Files & documents (1) winD
Customer Actions Aut	norized	
() authorize my	Agent to act on my behalf to perform the following specific acts and actions (initial all applicable boxes but at least one MUST be initialed):	
	1. Request and receive billing records history and all meter usage data used for bill calculation for all of my account(s), as specified herein, regarding utility services furnished by the Utility	
CD	2. EPA Benchmarking lastherizes usage information to be uploaded to the EPH's ENERGY \$7AR Portfolio Manager(b)	
**	3. Request and receive copies of correspondence with my account(s) concerning (initial all that apply)	
7 2	4. Request investigation of my dtillty tillica	
	5. Request special metering, and the right to access interval usage and other metering data on my account(s)	
	6. Request rate analysis	
	7. Request rate changes	
	B. Request and receive vertification of balances on my account(s) and discontinuance notices.	
	9. Other acts and functions (please specify)	
authorize the	release of my account information and authorize my agent to act on my behalf on the following basis (netial one box only):	
-	One time authorization only	
0 #	One year authorization	
co	Authorization is given for the period commencing with date of execution until	
	End date 4/25/26	
	G.imited in duration to three years from the date of execution.) Requests for information and/or for the acts and functions specified above will be Accepted and processed each time requested within the authorization period specified herein.	

4. In the next screen, review the LOA and select the check box for acknowledgment.

Contact & Service Account Info Customer Actions Authorized Legal Review		→
LOA-0000040173 Print Filled LOA Print All Added Service Accounts Reject LOA	Files & documents (1)	٥
Legal Review		1
Please review the completed Letter of Authorization		
Review Filled LDA Review All Added Service Accounts		
If you added more than two Service Accounts, you may review those by clicking "Review All Added Service Accounts."		
PLEASE CHECK THIS BOX TO CONFIRM YOU HAVE READ THE STATEMENT BELOW *		
L sheeby release, hold harmless, and indemnify the Utility from any liability, claims, demand, causes of action, damages, or expenses resulting from the use of customer information obtained pursuant to this authorization and from the taking of any action pursuant to this authorization, including rate changes.		
Close Keack Save and Close Submit		



5. Next, you will be asked to provide your signature and complete the captcha.

Contact & Service Account	Info Customer Actions Authorized Legal Review Review and Sign							
LOA-0000040173			Print Filled LOA Print All Added Service Accounts Reject LOA	Files & documents (1)				
Customer Contact I	formation		No. 687 1888	Carlos - San				
Type Full Name	Seattle Science (Science (Scie	Phone number Extension						
Email address	All sources and the Magnedia sets.							
Mailing Address	March 1994							
Customer Signed Date	Technology (
Service Address Inf	ormation							
Service Account Nur	ber 🔍 Service Address		▼ Service City ▼					
-			-					
	DRP Contact Information							
Full Name Email address	and an and a second sec	Organization Name Phone number						
Email address Mailing Address		Phone number Extension						
	and the second s							
Primary Third Party/DRP 5 Date	tried							
Customer Actions A	uthorized							
	rize my Agent to act on my behalf to perform the following specific acts and actions (initial all	applicable boxes but at least one MUST be init	lated):					
	1. Request and receive billing records history and all meter usage data used for bill calculation	for all of my account(s), as specified herein. n	egarding utility services furnished by the Utility					
RT	2. EPA Benchmarking (authorizes usage information to be uploaded to the EPA's ENERGY STA	R Portfolio Manager®)						
	3. Request and receive copies of correspondence with my account(s) concerning (initial all that	at apply)						
	4. Request investigation of my utility billio							
	5. Request special metering, and the right to access interval usage and other metering date on my account(s)							
	6. Request rate analysis							
	7. Request rate changes							
	8. Request and receive verification of balances on my account(s) and discontinuance notices.							
	9. Other acts and functions (please specify)							
I () auth	rize the release of my account information and authorize my agent to act on my behalf on the	following basis (Initial one box only):						
RT	One time authorization only							
	Limited to a one-time request for information and/or the acts and functions specified above a	n une unhe or receipt or this Authorization.						
57)	One year authorization							
-	Authorization is given for the period commencing with date of execution until							
Electronic Signatur								
hereby ref	hold harmless, and indemnify the URIII's from any liability claims damand excerct direction	manes, or expenses resulting from the	customer information obtained pursuant to this authorization and from the taking of any action pursuant to					
this authorization, includin	nois narmess, and indemnity the Utility from any liability, claims, demand, causes of action, da rate changes. signing please click 'Accept' before finishing the form.	and a second second from the use of	to the anti-the target of the anti-the and then the taking of any action pursuant to					
Cascifornic Signature - Afte	angenery preserve since Accepts which is instanting and form.							
	ta request or include special instructions with this LOA? sest data or provide special instructions now.	O No, data will be requeste	ed later.					
	u see in the picture below							
mc6phx	C							
Enter CAPTCHA								
Cancel								
			« Back Save and Close Complete Review					



6. After you click 'Complete Review,' the LOA will be submitted to SDG&E for validation. You have now completed the LOA signing process.

Thank you. We have received your information and will co at your convenience.	intact you if we have any questions or to provide you wit	h further instructions if necessary. We recommend y	ou print your LOA with the 'Print F	Filled LOA' Button below for future reference. You may close this browser window	·]
LOA-0000040173				Print Filled LOA Print All Added Service Accounts	 Piles & documents (2) Piles
	Rates and Regulations Energy Data Request Customer Choice San Diego Gas & Electric® Com	FERC Standards of Conduct - Order 717 Exercy Innovation Center Terms & Conditions namy to a subsidiary of Semps Energy®, SDGKEB are Dirible Go & S (Fert) Company The Trademarks to	CPUC Postings Major Projects Customer Service Id San Diego Gas & Electric are red	Total Electric Rates Careers Privacy Canter gistered trademarks of San Diego Gas & Electric Company.	

7. You will receive an email confirming the LOA. The third party will also be notified via email.

SDG&E Letter of Authorization Received D Inbox ×

do-not-reply-loa@sdge.com	 ☆	4

A Notification From SDG&E Consent to Share Portal

Request ID: LOA-0000040173

Thank you for your submission. You will be notified when your request has been validated or if more information is required. To check the status of your LOA, please visit If you are a registered user, you can manage this LOA by visiting sdge.com/loa and enter your LOA Request ID.

If you have any questions or concerns, email us at <u>CIM@sdge.com</u>. Please do not reply to this email.

If you are a registered user, you can manage this LOA by visiting If you are a registered user, you can manage this LOA by visiting sdge.com/loa

Thank you, SDG&E CIM

Interested in solar?

If you have questions about installing solar on your home, the "California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: <u>California Solar Consumer</u> <u>Protection Guide</u>. The Guide includes important information on:

- Available solar programs for income-qualifying customers
- False Claims to Watch Out For
- Your Rights
- Questions to Ask a Solar Provider Before Signing a Contract
- Solar Financing Options

SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit sdge.com/privacy.

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8. Any time during the above signing process, you may choose to reject the LOA by clicking '**Reject LOA**' at the top of the screen.

Contact & Service Account Info			$ \rightarrow$
LOA-0000041133	Print Filled LOA Print All Added Service Accounts Reject LOA	Files & documents (1)	٥
Customer Contact Information			1
Is this a Residential or Business Customer? First Name Last Name Email address	Phone number		

9. Click '**Yes**' in the confirmation pop-up.

Contact & Service Account Info						
LOA-0000041133			Print Filled LOA Print All Added Service Accou	nts Reject LOA	 Files & documents (1) 	0
Is this a Residential or Business Customer? First Name Last Name Email address	LOA Rejection Confirmation Are you sure you want to reject this LOA re No		Yes			
Service Address Information	L					
Service Account Number	Service Address		ty	Ŧ		
common .		-				

10. A confirmation message will be displayed.

Contact & Service Account Info							<mark> </mark> →
LOA-0000041133				Print Filled LOA	Print All Added Service Accounts Reject LOA	Files & documents (1)	¢
Customer Contact Information							:
Is this a Residential or Business Customer? First Name Last Name Email address		Phone LOA Rejection Confirmation Thank you, This LOA is now rejected and convenience.	number all necessary parties will be not	tified. You may close this popup at your			
Service Address Information							
Service Account Number	₩	Service Address	Ŧ	Service City	Ŧ		
and the second s				100			



11. You have now successfully rejected the LOA. You will also receive an email confirming the rejection. The third party will also be notified.

SDG&E Letter of Authorization Rejection Received Ď Index x		ē	Ø
do-not-reply-loa@sdge.com	☆	*	:

A Notification From SDG&E Consent to Share Portal

LOA Request ID: LOA-0000041133

Thank you for your submission. Because expected the above request, the customer's utility information will not be shared with you under the terms of this Letter of Authorization (LOA).

If you have any questions or concerns, email us at cisr-dro@sdge.com. Please do not reply to this email.

If you are a registered user, you can manage this LOA by visiting If you are a registered user, you can manage this LOA by visiting sdge.com/loa

Thank you, SDG&E

Interested in solar?

If you have questions about installing solar on your home, the "California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar Consumer Protection Guide. The Guide includes important information on:

- Available solar programs for income-qualifying customers
- False Claims to Watch Out For
 Your Rights
- Questions to Ask a Solar Provider Before Signing a Contract
- Solar Financing Options

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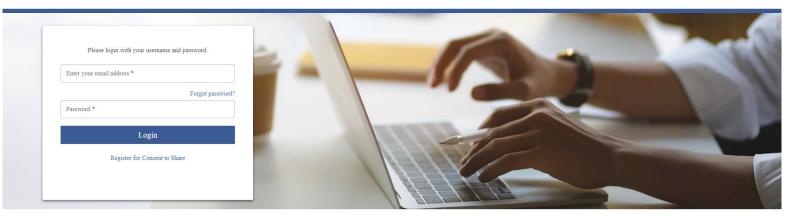


Option B - Log in to CtS

- 1. If you wish to sign the LOA by logging in to the application, follow these steps:
- 2. Log in to the **Consent to Share** application with your **My Energy Center** login credentials.

SDGE"

Consent To Share



3. Locate the LOA from the **My Open LOAs** tab. The LOAs that require your signature will be in **'Pending-Third Party Signature'** status.

	eate an LOA														Export All L
My	Open LOAs														
	C' Refre	b													
	Select	LOA ID	¥	LOA Status	T.	LOA Type 🛛 🐺	Purpose	41	Submission Process Ţ	LOA Create Date 🗮	Start Date ₹	End Date ₹	Customer First Name 🐺	Customer Last Name 🛱	Delegated Customer Email
		LOA-0000046	0158	Pending-Third Party Sig	nature	Standard CISR	EPA Benchmarking		Electronic		-	-	-	-	



4. Open the LOA and review the details.

CLS	🕒 LOA-0000040158 🔆	Contact & Service Account Info		
Đ			Close Print Filled LOA Print All Added Service Accounts	
	LOA Actions -			Files & documents (1)
	Purpose EPA Benchmarking	Customer Contact Information		And Andrewson and
ጽ	Start Date	Is this a Residential or Business Customer?		
	End Date	First Name Maliling Co.	untry	
	Status PENDING-THIRD PARTY SIGNATURE Created		and the second	
	Cieacea	Last Name Mailing Ad		
		Email address Mailing Cit	ty	
		Mailing Sta	ate / Province	
		Phone number Extension maining sta	and the second	
		Mailing Zip	p	
		Service Address Information		
		Service Account Number		
		100000 400		
		Primary Third Party / DRP Contact Information		
		Organization Name * Mailing Cour	ntry*	
			ates of America	
		First Name * Mailing Addr	iress *	
		Please pro	ovide the third party mailing address.	
		Last Name * Mailing City		
			ovide the Third Party city.	
			te / Province *	
		CA Confirm Email Address * Mailing Zip *		
			* ovide the Third Party zipcode.	
		Phone number * Extension		
		The Utility will provide the information requested above, to the extent available, via any one of the following.	My (Agent) preferred format is (Check all that apply):*	
		Hard copy via US Mall (if applicable)		
		Electronic format via electronic mail (if applicable) to this e-mail address:		
		Facsimile at this telephone number:		
PK				
		Close	Save and Close Next	
				7:58 PM
A H	Type here to search O 🛱	<u>e</u> = <u>e</u>		へ 記 (小) 7:58 PM 1/24/2022 ワ



5. Click 'Next' and review the authorizations provided by customer in the next screen.

cts	🖕 LOA-0000040158 🖒	Contact & Service Account Info Customer Actions Authorized	_	→
Ð	LOA Actions -	Close Print Filied LOA Print All Added Service Accounts	0 The C descents m	
\triangle		Customer Actions Authorized	Files & documents (1)	¢
8	Purpose EPA Benchmarking Start Date	I (i) authorize my Agent to act on my behalf to perform the following specific acts and actions (initial all applicable boxes but at least one MUST be initialed):	International Contents	:
	End Date Status PENDING-THIRD PARTY SIGNATURE Created	L.Request and receive billing records history and all meter usage data used for bill calculation for all of my account(s), as specified herein, regarding utility services furnished by the Utility		
		RT 2. EPA Benchmarking (authorizes usage information to be uploaded to The EPA's ENERGY STAR Portfolio Manager®)		
		3. Request and receive copies of correspondence with my account(s) concerning (initial all that apply)		
		4. Request investigation of my utility bill(s)		
		5. Request special metering, and the right to access interval usage and other metering data on my account(s)		
		6. Request rate analysis		
		7. Request rate changes		
		8. Request and receive verification of balances on my account(s) and discontinuance notices.		
		9. Other acts and functions (please specify)		
		I () authorize the release of my account information and authorize my agent to act on my behalf on the following basis (initial one box only):		
		One time sutherization only		
		RT One year authorization		
		Requests for information and/or for the acts and functions specified above will be accepted and processed each time requested within the twelve month period from the date of execution of this Authorization.		
		Beginning on the date this LOA commences and ending on:		
		Authorization is given for the period commencing with date of execution until		
(PK)				
		Close K Back. Save and Close Next		



6. Click on Review filled LOA to view the document. Then be sure to complete the check box for the legal statement.

cts	😑 LOA-0000040158 🔂	Contact & Service Account Info Customer Actions Authorized Legal Review	-	→
⊎ ∆	LOA Actions *	Close Print Filled LOA Print All Added Service Accounts	Files & documents (1)	0
	Purpose EPA Benchmarking	Legal Review Please review the completed Letter of Authorization		
	Start Date		contract from	
	Status PENDING-THIRD PARTY SIGNATURE Created	Review Al Added Service Accounts		
		If you added more than two Service Accounts, you may review those by clicking "Review All Added Service Accounts."		
		PLEASE CHECK THIS BOX TO CONFIRM YOU HAVE READ THE STATEMENT BELOW *		
		t. hereby release, hold harmless, and indemnity the Utility from any liability, claims, demand, causes of action, damages, or expenses resulting from the use of customer information obtained pursuant to this authorization and from the taking of any action pursuant to this authorization, including rate changes.		
		Close		



7. Provide your signature in the next screen.

cts	📥 LOA-0000040158 🖧	Contact & Service Account Info Customer Actions Authorized Legal Review Review and Sign	
Ð			- I→
6	LOA Actions -	Close Print Filled LOA Print All Added Service Accounts	Files & documents (1)
	Purpose EPA Benchmarking	Customer Contact Information	The second second second
	Start Date	Type Phone number	• • • • • • • • • • • • • • • • • • •
	End Date	Full Name Extension	
	Status PENDING-THIRD PARTY SIGNATURE Created	Email address Mailing Address	
		Customer Signed Date	
		Concorner anyme bear	
		Service Address Information	
		Service Account Number	
		Primary Third Party/DRP Contact Information Full Name Orsanization Name	
		Full Name Organization Name Email address Phone number	
		Mailing Address Extension	
		Primary Third Party/DRP Signed	
		Date	
		Customer Actions Authorized	
		I () suthorize my Agent to act on my behalf to perform the following specific acts and actions (initial all applicable boxes but at least one MUST be initialed):	
		1. Request and receive billing records history and all meter usage data used for bill calculation for all of my account(s), as specified herein, regarding utility services furnished by the Utility	
		RT 2. EPA Benchmarking (authorizes usage information to be upleaded to the EPA's ENERGY STAR Portfolio Manager®)	
		RT 2. EPA Benchmarking (authorizes usage information to be uploaded to the EPA's ENERGY STAR Portfolio Manager®)	
		3. Request and receive copies of correspondence with my account(s) concerning (initial all that apply)	
		4. Request investigation of my utility bill(s)	
		E. Bequest reacts metalogs and the right to second lateral urage and other metalogs data as an execution	
		5. Request special metering, and the right to access interval usage and other metering data on my accountis)	
		6. Request rate analysis	
		7. Request rate changes	
		B. Request and receive verification of balances on my account(s) and discontinuance notices.	
		9. Other acts and functions (please specify)	
		I () authorize the release of my account information and authorize my agent to act on my behalf on the following basis (initial one box only):	
		One time authorization only	
		One time authorization only	
		RT One year authorization	
		KI suite boni interneti interneti	
		Requests for information and/or for the acts and functions specified above will be accepted and processed each time requested within the twelve month period from the date of execution of this Authorization.	
		Beginning on the date this LOA commences and ending on:	
		And a second secon	
		Authorization is given for the period commencing with date of execution until	
		Electronic Dispeture	
		Electronic Signature	
		k, hereby release, hold harmless, and indemnity the Utility from any liability, claims, demand, causes of action, damages, or expenses resulting from the use of customer information obtained pursuant to this authorization, including rate changes.	
		obtained pursuant to this authorization and from the taking of any action pursuant to this authorization, including rate changes. Electronic Signature - After signing please click 'Accept' before finishing the form. *	
		Would you like to make a data request or include special instructions with this LOA?	
		Yes, I would like to request data or provide special instructions now.	
		Cancel Kee and Close Complete Review Cancel	



8. After you click 'Complete Review,' the LOA will be submitted to SDG&E for validation. You have now completed the LOA signing process.

cts	😑 LOA-0000040166 😭	Thank you. We have received your information and will contact you if we have any questions or to provide you with further instructions if necessary. We recommend you print your LOA with the 'Print Filled LOA' Button below for future reference. You may close this browser window at your convenience.	ŀ→	
٠	LOA Actions -	Close Print Filled LOA Print All Added Service Accounts	🖉 Files & documents (2) 🔅	
	Purpose EPA Benchmarking Start Date	Customer Information	L man somethin -	
	End Date	Type Full Name	CONTRACT TARE	
	Status PENDING-SDG&E VALIDATION	Email address Phone number	Lange the second second	
		Mailing Address Extension		
	Details	Customer Signed Date		
		Service Account Information		
		(Fields C Refresh		
		Service Account Number 🛛 🗮 Service Address 🗮 Service City 🗮		
		100-100 MR		ľ
		Primary Third Party/DRP Information		
		Full Name Organization Name		
		Email address Mailing Address		
RS		Phone number Primary Third Party/DRP Signed Date		
Start		Extension		,

9. You will receive an email confirming the LOA. The third party will also be notified via email.

	SDG&E Letter of Authorization Received Index ×	6	
*	do-not-reply-loa@sdge.com	4	:
	A Notification From SDG&E Consent to Share Portal		
	Request ID: LOA-0000041137		
	Thank you for your submission. You will be notified when your request has been validated or if more information is required. To check the status of your LOA, please visit if you are a registered user, you can manage this LOA by visiting sdge.com/log and enter your LOA if you have any questions or concerns, email us at <u>CIM@sdge.com</u> . Please do not reply to this email.	Reque	st ID.
	If you are a registered user, you can manage this LOA by visiting if you are a registered user, you can manage this LOA by visiting adge.com/loa		
	Thank you, SDG&E CIM		
	Interested in solar?		
	If you have questions about installing solar on your home, the "California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: <u>California Solar Consumer Protection Guide</u> . The Guide in important information on:	cludes	
	Available solar programs for income-qualifying customers False Claims to Watch Out For Your Rights Questions to Ask a Solar Provider Before Signing a Contract Solar Financing Options		
	SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit sdge com/privacy.		



10. Any time during the above signing process, you may choose to reject the LOA by selecting '**Reject LOA**' from **LOA Actions** menu.

LOA-0000040158 🗘			
LOA Actions ·		Close Print Filled LOA Print All Added Service Accounts	Files & documents (1)
Filed LOA PA Benchmarking	Customer Contact Information		the survey of the local division of the loca
t All Added Service A	Is this a Residential or Business Customer?		In the second se
e	The second s		contract - materia
	First Name	Mailing Country	
t SIGNATURE	and a second sec	tering finite of insertion	
el ante properti a accesso	Last Name	Malling Address	
pate	annexe and a second sec	1000 T 100	
	Email address	Malling City	
	and approximately state of the state.	Toronal Barrison Contraction C	
	Phone number Extension	Mailing State / Province	
	Phone number Extension	-	
		Mailing Zip	
		Mailing 20p	

11. Click 'Yes'., in the confirmation screen.

	-0000040158 습	Contact & Service Account Info	_	∣→
LOA Actions	•	Close Print Filied LOA Print All Added Service Accounts	Files & documents (1)	٥
Purpose	EPA Benchmarking	Reasons for Rejection	And in case of the local division of the loc	
Start Date	and the second sec	Are you sure you want to reject this LOA request?	10000 at 184	1
End Date	and the second s	Are you sure you want to reject this LUA request?		
Status	PENDING-THIRD PARTY SIGNATURE	No		
Created	AND COUNTY STREET,			

12. A confirmation message will be displayed.

LOA-0000040158	Thank you, This LOA is n	ow rejected and all necessary parties	will be notified. You may close this	window at your convei	nience.			
LOA Actions -				CI	ose Print Filled LOA Print All A	dded Service Accounts	Files & documents (1)	φ
Purpose EPA Benchmarking	Customer Informa	tion						
Start Date	Туре	No. of Concession, Name		Full Name	INST COMPT		contra an real	:
End Date Status RESOLVED-THIRD PA	Email address	and the second second second		Phone number	101-002-0008			
Created	Mailing Address	MELTING Contraction of the NAME		Extension				
Details	Customer Signed Date							
	Service Account l	nformation						
					I I I I I I I I I I I I I I I I I I I	elds C Refresh		
	Service Account N	lumber	Service Address		F Service City	Ŧ		
	and a second sec		1000		100			

You have now successfully rejected the LOA. You will receive an email confirming the rejection. The third party will also be notified.



8 C

SDG&E Letter of Authorization Rejection Received D Inbox ×

do-not-reply-loa@sdge.com

A Notification From SDG&E Consent to Share Portal

LOA Request ID: LOA-0000040158

Thank you for your submission. Because rejected the above request, the customer's utility information will not be shared with you under the terms of this Letter of Authorization (LOA).

If you have any questions or concerns, email us at <u>CIM@sdge.com</u>. Please do not reply to this email.

If you are a registered user, you can manage this LOA by visiting If you are a registered user, you can manage this LOA by visiting sdge.com/loa

Thank you, SDG&E CIM

Interested in solar?

If you have questions about installing solar on your home, the "California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar Consumer Protection Guide". The Guide includes important information on:

· Available solar programs for income-qualifying customers

False Claims to Watch Out For

- Your Rights
- Questions to Ask a Solar Provider Before Signing a Contract
- Solar Financing Options

SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit sdge com/privacy.

Option C - Print the LOA and sign on paper

You may request the Third Party to provide the hard copy of the LOA form for you to review and sign. You may also log in to CtS or access the LOA through the link provided in the email.

1. After you access the LOA, click 'Print Filled LOA.'

→
s (1) 🗘
1



2. This will download the LOA PDF with pre-populated information. Review the details in the LOA and sign the LOA.

The Utility will provide standard customer information without charge up to two times in a 12 month period per service account. After two requests in a year, I understand Inaybe responsible for charges that may be incurred to process this request. Revised 1/2014 Form 185-1000 Page 1 /2014 Form 195-1000	If no time period is specified, authorization will be limited to a one-time authorization Revised 1/2014 Page 2 of 2 Page 2 of 2
9. Other acts and functions (please specify)	
 Request and receive verification of balances on my account(s) and discontinuance notices. 	Executed this day ofYEAR
7. Request rate changes.	
6. Request rate analysis.	COMPANY
Request special metering, and the right to access interval usage and other metering data on my account(s).	
4. Request investigation of my utility bill(s).	AGENT SIGNATURE TELEPHONE NUMBER
C. Previous or proposed issuance of adjustments/credits; or d. Other previously issued or unresolved/disputed billing adjustments.	damages, or expenses resulting from the use of oustomer information obtained pursuant to this authorization and from the taking of any action pursuant to this authorization, including rate changes.
A. Verification of rate, date of rate change, and related information; b. Contracts and Service Agreements;	I (Agent), hereby release, hold harmless, and indemnify the Utility from any liability, claims, demand, causes of action,
3. Request and receive copies of correspondence in connection with my account(s) concerning (initial all that apply):	Executed this day ofYEARatat
2. EPA Benchmarking (authorizes usage information to be uploaded to the EPA's ENERGY STAR Portfolio Manager®).	
 Request and receive billing records, billing history and all meter usage data used for bill calculation for all of my account(s), as specified herein, regarding utility services furnished by the Utility¹. 	AUTHORIZED CUSTOMER BIGNATURE TELEPHONE NUMBER
all applicable boxes):	submitting a written request. [This form 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).]
INFORMATION, ACTS AND FUNCTIONS AUTHORIZED – This authorization provides authority to the Agent. The Agent must thereafter provide specific written instructions/requests (e-mail is acceptable) about the particular account(s) before any information is released or action is taken. In certain instances, the requested act or function may result in cost to you, the customer. Requests for information may be limited to the most recent 12 month period.	authorization request submitted before releasing information or taking any action on my behalf. I authorize the Utility to release the requested information on my account or facilities to the above Agent who is acting on my behalf regarding the matters listed above. I hereby release, hold harmeless, and indemnify the Utility from any liability, claims, demands, causes of action, damages, or expenses resulting from: 1) any release of information to my Agent pursuant to this Authorization; 2) the unauthorized use of this information by my Agent; and 3) from any actions taken by my Agent pursuant to this Authorization, including rate changes. I understand that I may cancel this authorization at mite by
(For more than two accounts, please list additional accounts on a separate sheet and attach it to this form)	that my Agent has authority to act on my behalf and request the release of information for the accounts listed on this form and perform the specific acts and functions listed above. I understand the Utility reserves the right to verify any
2. <u> ERVICE ADDRESS OTY SERVICE ADDRESS OTY SERVICE ADDRESS OTY </u>	perjury under the laws of the State of Galifornia that I am authorized to execute this document on behalf of the Customer of Record listed at the top of this form and that I have authority to financially bind the Customer of Record. I further certify
1. ERVICE ADDRESS OTY SERVICE ADDRESS	I (Customer),(print name of authorized signatory), declare under penalty of
ACCOUNTS INCLUDED IN THIS AUTHORIZATION:	Facsimile at this telephone number:
cirry state zp to act as my agent and consultant (Agent) for the listed account(s) and in the categories indicated below:	Hard copy via US Mail (if applicable).
	The Utility will provide the information requested above, to the extent available, via any one of the following. My (Agent) preferred format is (check all that apply):
NAME OF THRD FARTY MAUNG ACCRESS	
, and do hereby appoint	specified herein. RELEASE OF ACCOUNT INFORMATION:
of (Customer) have the following mailing address	(Limited in duration to three years from the date of execution.) Requests for information and/or for the acts and functions specified above will be accepted and processed each time requested within the authorization period
NAME TITLED APPLICABLE	Authorization. Authorization is given for the period commencing with the date of execution until
,	One year authorization - Requests for information and/or for the acts and functions specified above will be accepted and processed each time requested within the twelve month period from the date of execution of this
THIS IS A LEGALLY BINDING CONTRACT—READ IT CAREFULLY (Please Phylor Tited)	One time authorization only (limited to a one-time request for information and/or the acts and functions specified above at the time of receipt of this Authorization).
OR ACT ON A CUSTOMER'S BEHALF	I (CUSTOMER) AUTHORIZE THE RELEASE OF MY ACCOUNT INFORMATION AND AUTHORIZE MY AGENT TO ACT ON MY BEHALF ON THE FOLLOWING BASIS ² (<u>initial</u> one box only):
AUTHORIZATION TO: RECEIVE CUSTOMER INFORMATION	AUTHORIZATION TO: RECEIVE CUSTOMER INFORMATION OR ACT ON A CUSTOMER'S BEHALF

3. After the LOA is completed and signed, scan the LOA to a PDF document and upload through <u>www.sdge.com/loa</u>. Click on "Continue – I've already completed an LOA".

Letter of Authorization (LOA)

A Letter of Authorization (LOA) provides you, the customer, a way to authorize us to share your energy data with Third Parties. It can also authorize a Third Party to act on your behalf. Authorizations involve billing calculations, EPA benchmarking, correspondence in connection with your accounts, investigation of utility bills, rate analysis and changes, etc.

Consent to Share

Consent to Share (CtS) is SDG&E's system to manage Letters of Authorization.





How to Revoke an active authorization?

After an LOA is validated and active, SDG&E will begin the data disclosure with the respective Third Party as per the guidelines of the LOA. If at any point you wish to stop the data disclosure, you may revoke your authorization. The data disclosure will be discontinued immediately. You must then submit a new authorization request to restart the data disclosure after revoking.

There are 2 methods you can revoke an LOA:

- a) Revoke the LOA by yourself
- b) Email <u>cim@sdge.com</u> and request the revocation

Revoking the LOA by yourself

1. Log in to CtS and open the 'Active' LOA that you wish to revoke.

C Refres	LOA ID 👳	LOA Status	E LOA Type 🗧	≂ Purpose ₹	Submission Process □	.OA Create Date 👳	Start Date 후	End Date \equiv	Third Party/DRP ≡ First	Primary Third Party/DRP ╤ Last Name	Third Party/DRP ╤ I First	Secondary Third Party/DRF Last Name
	LOA-0000040165	Pending-Customer Signatur	Standard CISF	EPA Benchmarking	Electronic						Nume	tunit.
	LOA-0000041133	Pending-Third Party Signatu	re CISR-DRP	Third Party Demand Response Program	Electronic		-					
cretes	2	lydata Email							Primary	Primary	Secondary	Sec
tive LOAs			LOA Type ╤	Purpose ₹	Submission Process 3	₹ LOA Create Date	ङ् इtart Date	e ₹ End Date		Last	First	∓ Part Last
C Refres		LOA Status 🛛 👻							ThIrd ₹ Party/DRP First Name	Third	Third	Seco Third ⊒ Party Lest Name
C Refres	h LOA ID ₹		Standard CISR	Purpose EPA Benchmarking EPA Benchmarking	Submission Process 3 Electronic Electronic	₹ LOA Create Date	₹ Start Dat	e ₹ End Date			P = Third Party/DRP	∓ Party Last



2. Click on 'LOA Actions' and choose 'Revoke.'

cts	LOA-00	000040166 🏠				Close	Print Filled LOA P	vint All Added Service Accounts		→
Ē	LOA Actions		Customer Information						Files & documents (2)	0
Refresh			Туре	The second second		Full Name	SHEET SCHOOL ST		CONTRACTOR AND	
Print Fille Print All Close	ed LOA Added Service A	PA Benchmarking	Email address	-	- /	Phone number	10.000.000			1
Сюру		ineres .	Mailing Address	Contraction in the local		Extension			CONTRACTOR AND A	
Revoke	Created	CTUE	Customer Signed Date						Files & documents (2)	:
	Details	1	Service Account Information	tion						
								Ø Fields C Refresh		
			Service Account Number	T	Service Address	4	Service City	Ŧ		
			and the second second		1000					
			Primary Third Party/DRP	Information						
			Full Name	1000100		Organization Name				
			Email address	protection republic		Mailing Address				
			Phone number	30.00.000		Primary Third Party/DRP S Date	ligned			
			Extension							

3. In the confirmation screen choose 'Yes.'

CtS	LOA-0000040166 🏠			Close	Print Filled LOA Print All Added Service Accounts		∣→
£	LOA Actions - Purpose EPA Benchmarking Start Date End Date Status ACTIVE Created		his LOA? ed information may be transmitted to the Third Party/DR y revoked for a service account when such service accou		d during which the authorization was valid. In all cases,	 β Files & documents (2) Σ 	¢ : :
	Details	Customer Information					
	Details	Туре	Technica -	Full Name	Sector Contenting		
		Email address	argenheigenturture 🥖	Phone number	10.000.000		
		Mailing Address Customer Signed Date	AND THE ADDRESS OF ADD	Extension			





4. When you click 'Yes', the LOA will be revoked. Depending on the type of LOA, you may be asked to provide your signature. If the LOA you are revoking was created for a Third-Party Demand Response Program, then you will need to provide the signature to complete the revocation. For such revocations, you may provide a future date on which you want to revoke the LOA.

cts	LOA-0000040175 🗘	Close Print Filled LOA Print All Added Service Accounts Print Revocation Form		→
Ð		DRP REVOCATION OF AUTHORIZATION		
•	LOA Actions •	I, have been authorized under Section I above to revoke the authorization to release information of the Customer of Record's listed at the top of this form to the First and Second DRP(s) (as listed above), and to notify SDGEE when the Customer of Record diserrolis from the DRP(s) demand response hereby revoke the authorization to release information to the DRP(s) listed above. Further, I hereby notify SDGEE that the date of the Customer's actual or anticipated diserrolisted disconse services is I hereby release, hold harmless,	Files & documents (3)	¢
8	Purpose Third Party Demand Response Program Start Date	and indemnify SDG&E from any liability, claims, demands, causes of action, damanges or expenses resulting from revocation of the authorization to release information to the DRP(s). Listed above, and/or from my failure to timely notify SDG&E of the Customer's disenroliment from my Demand Response services. I understand that this revocation will apply to both the First and Second DRP(s).		:
	End Date	Electronic Signature - After signing please click 'Accept' before finishing the form. \star	on boundary, Annu	
	Status ACTIVE		And	- E
	Created		UNITER TANK	
				:
		Revocation Date	View all	
		Please change the date if you wish to revoke the LOA on a later date. The LOA will be automatically revoked on the date you choose.		
		Cancel Submit		

5. A confirmation message will be displayed.

	0040166	Thank You. The LOA is now Rev	oked and all necessary parties w	ill be notified. You may close	this message at your conven	nience.			
LOA Actions •					Clos	se Print Filled LOA Print All	Added Service Accounts	Files & documents (2)	
Purpose EP	PA Benchmarking	Customer Information						And Desire to second to -	
Start Date		Туре	Number		Full Name	SHEET SCHOOL ST		states and the -	
End Date Status	RESOLVED-REVOKED	Email address	-		Phone number	10.001.000		Parallel Street of	•
Revoke Date	04.000	Mailing Address	100 T 100		Extension			contrast - Task	
Created	on, casa disting	Customer Signed Date	contented in the local diversion of the local						
etalls									
		Service Account Inform	nation						
						اھ	Fields C Refresh		
		Service Account Numbe	r Ŧ	Service Address	Ŧ	Service City	Ŧ		
		and the second second		1000					



You will receive an email confirming the revocation and the customer will also be notified.

SDG&E Letter of Authorization Revoked D Inbox ×		ē	Ø
do-not-reply-loa@sdge.com	6	4	:

A Notification From SDG&E Consent to Share Portal

Request ID: LOA-0000040186

The Letter of Authorization (LOA) above has been revoked by . Customer information will no longer be shared with the third party under the terms of this LOA.

To submit a new request, please visit If you are a registered user, you can manage this LOA by visiting sdge.com/loa .

If you have any questions or concerns, email us at cisr-drp@sdge.com. Please do not reply to this email.

If you are a registered user, you can manage this LOA by visiting If you are a registered user, you can manage this LOA by visiting sdge.com/loa

Thank you, SDG&E

Interested in solar?

If you have questions about installing solar on your home, the "California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar Consumer Protection Guide". The Guide includes important information on:

- Available solar programs for income-qualifying customers
- False Claims to Watch Out For
- Your Rights
- Questions to Ask a Solar Provider Before Signing a Contract
- Solar Financing Options

SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit sdge.com/privacy.



How to copy an existing LOA and create a new one

You may copy any of your existing LOAs to create new LOAs. This is helpful when your current LOA is reaching expiration, and you want to create a new one to continue the data disclosures.

- 1. Log in to CtS and open the LOA that you wish to copy.
- 2. Go to LOA Actions and click 'Copy.'

cis 🔁 LOA-0000040165 🏠	Close Print Filled LOA Print All Added Service Accounts	l→
LOA Actions -	Customer Information	Files & documents (2)
Refresh Print All Added Service A Close Copy Cancel Created Created	Type Full Name Email address Phone number Mailing Address Extension Customer Signed Date Extension	
Details	Service Account Information	
	Service Account Number $\overline{\forall}$ Service Address $\overline{\forall}$ Service City $\overline{\forall}$	

3. A new LOA will be created and all information from the source LOA will be copied automatically to the new one. Review these details thoroughly and make any updates required.



SDGE "		Search Site
cts 🔁 LOA-0000266001 🕁	Contact & Service Account Info	⊢→ 1
	Close Print Filled LOA Print All Added Service Accounts	
LOA Actions -	Customer Contact Information	🖉 Files & documents (0) 🛛 🌣
Purpose Seeking to Act on Behalf of Customer Start Date	Is this a Residential or Business Customer? *	No items
End Date	Residential O Business	
Status DRAFT	First Name * Mailing Country	
Created	· · · · · · · · · · · · · · · · · · ·	
	Last Name * Mailing Address	
Details		
	Organization Name Mailing City	
	Title Mailing State / Province	
	Email address + Mailing Zip	
	Confirm Email Address +	
	Phone number * Extension	
	Nata Automate willing address and small address much be uplane and different form by Third Perly.	
	Note: Customer's mailing address and email address must be unique and different from the Third Party.	
	Service Address Information	
	Click "Add account number" to add Service Account Numbers to this LOA. The service account number can be found on the monthly bill.	
	Note: only include the first 10 or 12 digits, do not include any additional digits, spaces, dashes, or periods.	
	+ Add account number Row Count: 3	
	Service Account Number 👳 Service Address 👳 Service City 🚎	
	2	
	3	
	If you have several account numbers to add, you may upload them in bulk using the excel template provided below.	
	X EClick here to download the excel template. Add the service account number information in the excel. Save the document on your local computer.	
	Click "Choose File" to select the excel file to upload. Choose File" No file chosen	
	Click "Bulk Upload Service Accounts" to complete the upload process and to add the service account numbers to the LOA.	
	Bulk Upload Service Accounts	
	Primary Third Party / DRP Contact Information	
	Organization Name * Mailing Country *	
	First Name * Mailing Address *	
	Last Name * Mailing City *	
	Email address * Mailing State / Province *	
	Confirm Email Address * Mailing Zip *	
	Phone number * Extension	
	The Utility will provide the information requested above, to the extent available, via any one of the following	
	channels. My (Agent) preferred format is: Email address *	
	Email Email address * Hard copy via US Mail (If applicable)	
	Fax Re-Enter Email Address +	
	Close Save and Close Next	



4. Select the authorizations that you want the customer to initial.

S	SDGE		Smarch Stite O Consent To Share
	SDGE	n	Search Site Consent To Share
cts +	LOA Actions	☆	Contact & Service Account Info Customer Actions Authorized Legal Review Close Print Filled LOA Print All Added Service Accounts
٥	Purpose Start Date End Date Status Created	Seeking to Act on Behalf of Customer	Legal Review Please review the completed Letter of Authorization Review Flide LOA Review Flide LOA It you added more than two Service Accounts It you added more than two Service Accounts, you may review those by clicking "Review All Added Service Accounts." PLEASE CHECK Thild BOX TO COMFIRM YOU HAVE READ THE STATEMENT BELOW * Methorization and from the taking of any action pursuant to this authorization, including rate changes. Close You added Service Account

5. Review the new LOA.



6. Sign the LOA.

CtS		Contact & Service Account Info Customer Actions Authorized Legal Review Review and Sign
	LOA-0000040158 🏠	Contract's service account rins Customer actions authorized Legal nervee into sign. (→
Ð	LOA Actions -	Close Print Filled LOA Print All Added Service Accounts
		Customer Contact Information
28	Purpose EPA Benchmarking	
	Start Date	Type Phone number 2 Full Name Extension
	End Date Status PENDING-THIRD PARTY SIGNATURE	Canal address
	Created	Nailing Address
		Customer Stoned Data
		Customer Signed Date
		Service Address Information
		Service Account Number 👳 Service Address. 🐺 Service City 🐺
		Primary Third Party/DRP Contact Information
		Pull Name Organization Name Email address Phone number
		Line sources Filler Filler
		and to the
		Primary Third Party/DRP Signed Date Date Date Date Date Date Date Date
		Customer Actions Authorized
		I () authorize my Agent to act on my behalf to perform the following specific acts and actions (initial all applicable boxes but al least one MUST be initialed):
		1. Request and receive billing records history and all meter usage data used for bill calculation for all of my account(s), as specified herein, regarding utility services furnished by the UUIIty
		RT 2. EPA Benchmarking (authorizes usage information to be uplaaded to the EPA's ENCROY STAR Portfolio Managenti)
		3. Request and receive copies of correspondence with my account(s) concerning (initial all that apply)
		- 4. Request investigation of my utility bills)
		5. Request special metering, and the right to access interval usage and other metering data on my account(s)
		S. Request special metering, and the right to access interval usage and other metering data on my account(s)
		- 6. Request zete analysis
		- 6. Request rate analysis
		7, Request rate changes
		B. Request and receive verification of balances on my eccount(s) and discontinuance notices.
		9. Other acts and functions (please specify)
		I Duthorize the release of my account information and authorize my agent to act on my behalf on the following basis (initial one box only):
		1 / Journal de una reference de una general de una general de euror parter de de carrier de transmerge deste transmerge de de transmerge de transmerge de transmerge de de transme
		One time authorization only
		RT One year authorization
		Requests for information and/or for the acts and functions specified above will be accepted and processed each time requested within the twelve month period from the date of execution of this Authorization.
		Beginning on the date this LDA commences and ending on:
		Brajinning on the date this LOA commences and ending on:
		Authorization is given for the period commencing with date of execution until
		Electronic Electronic Electronic
		Electronic Signature
		L hereby release, hold harmless, and indemnify the Utility from any liability, claims, demand, causes of action, demages, or expenses resulting from the use of customer information
		obtained pursuant to this authorization and from the taking of any action pursuant to this authorization, including rate changes.
		Electronic Signature - After signing please click Vaccept' before finishing the form.
		Would you like to make a data request or include special instructions with this LOA?
		Ves, I would like to request data or provide special instructions now.
PK		
		Cancel « Back Save and Close Complete Review



7. A confirmation message will be displayed.

cts +	😑 LOA-0000040193 😭			u if we have any questions or to provide you with fu close this browser window at your convenience.	rther instructions if necessary. We re	commend you print your LOA with		∣→
	LOA Actions +				Close Print Filled LOA	Print All Added Service Accounts	Files & documents (1)	¢
	Purpose EPA Benchmarking Start Date	Customer Information						:
	End Date	Туре	to the local data	Full Name	NUMBER OF STREET		1007031-7480	
	Status PENDING-CUSTOMER SIGNATURE	Email address	encode la patrice	Phone number	10.000.000			
	Created	Mailing Address	ALC: NAME	Extension				
	Details	Customer Signed Date						
		Service Account Information	ı					
						S Fields C Refresh		
		Service Account Number	=	Service Address	= Service City	7		
		and some of the second se		1000	1001			

You will receive an email confirming the LOA.

SDG&E Letter of Authorization Received 🛸 Inbox x			•
do-not-reply-loa@sdge.com	$ H ^{-1} = V + V + V + V + V $	☆	*
A Notification From SDG&E Consent to Share Portal			
Request ID: LOA-0000040193			

Thank you for your submission. You will be notified when your request has been validated or if more information is required. To check the status of your LOA, please visit <u>sdge.com/loa</u> and enter your LOA Request ID. If you have any questions or concerns, email us at <u>CIM@sdge.com</u>. Please do not reply to this email.

If you are a registered user, you can manage this LOA by visiting sdge.com/loa.

Thank you, SDG&E CIM

Interested in solar?

If you have questions about installing solar on your home, the "California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar Consumer Protection Guide. The Guide includes important information on:

- Available solar programs for income-qualifying customers
- False Claims to Watch Out For
- Your Rights
 Questions to Ask a Solar Provider Before Signing a Contract
- Solar Financing Options

SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit sdge.com/privacy.

The customer will be notified to review and sign the new LOA.



How to cancel a request before its active?

Any time before the LOA becomes valid/active, you may choose to cancel it.

There are 2 methods you can cancel an LOA:

- a) Cancel the LOA by yourself
- b) Email <u>cim@sdge.com</u> and request the revocation

Cancelling the LOA by yourself

1. Log in to CtS and open the pending (yet to be active) LOA that you wish to cancel. You may find these in the '**My Open LOAs**' table in the home screen.

cts +	Create	an LOA													Export All LOAs
•	Му Ор	en LOAs													
		C Refre	sh									Primary	Primary	Secondary	Secondary
		Select	LOA ID 👳	LOA Status 👳	LOA Type 葉	Purpose	Ŧ	Submission = Process	LOA Create Date 👳	Start Date 葉	End Date ₹	Third Party/DRP ╤ First Name	Third Party/DRP ╤ Last Name	Third Party/DRP ╤ First Name	Third Party/DRP ╤ Last Name
			LOA-0000040173	Pending-Third Party Signature	Standard CISR	EPA Benchmarking		Electronic			1000		-		
			LOA-0000040165	Pending-SDG&E Validation	Standard CISR	EPA Benchmarking		Electronic		-	-	-	-		

2. Go to 'LOA Actions' and click 'Cancel.'

CIS LOA-0000040165 5	3		ļ	Close Print Filled LOA Print All	Added Service Accounts		→
LOA Actions -	Customer Information					Files & documents (2)	0
Refresh Print Filled LOA Print All Added Service A Close Copy	Type Email address Mailing Address	Annon Maria	Full Name Phone number Extension	1000-000000 100000 -			
Cancel Created Created	Customer Signed Date	ation					1
				Ø	Fields C Refresh		
	Service Account Number	₹	Service Address		7		



3. Click '**Yes'** to provide confirmation.

	-0000040165 ☆			Close	Print Filled LOA Print All Added	Service Accounts		∣→
LOA Actions Purpose Start Date End Date	• EPA Benchmarking	LOA Cancel Confirma Are you sure you want to cance				Yes	Ø Files & documents (2)	0 1
Status Created	PENDING-SDG&E VALIDATION	Customer Information	No. of Concession, Name	Full Name	NAME ADDRESS OF			1
Details		Email address	an or set of the set of	Phone number	100.000.000			
		Mailing Address Customer Signed Date	MC-1 MA Toronala,	Extension				

4. The LOA will be cancelled and a confirmation message will be displayed.

cts	😑 LOA-0000040165 🔄	Thank you. This LOA is now cance	iled and all necessary parties will be notified. You ma	y close this window at your convenience.			∣→
	LOA Actions -			Close	Print Filled LOA Print All Added Service Accounts	Files & documents (2)	\$
	Purpose EPA Benchmarking	Customer Information				NAME ADDRESS OF	
	Start Date	Туре	No. of Concession, Name of	Full Name	NAME OF ADDRESS OF	simple to a set	
	End Date Status RESOLVED-CANCELLED	Email address	procession in the second	Phone number	10.000.000	The second second second	
	Created	Mailing Address	MELTING COMPANY, CONTRACTOR	Extension		contract from	
	Details	Customer Signed Date					

You will receive an email confirming the cancelation. The customer will also be informed about the cancellation.

SDG&E Letter of Authorization Canceled Interx ×			ē	Ľ				
do-not-reply-loa@sdge.com								
A Notification From SDG&E Consent to Share Portal								
Request ID: LOA-0000040165								
This message is to inform you that the Letter of Authorization (LOA) has been canceled. The request will no longer be processed and the customer's utility information will not be shared with the third party under the terms of	this LOA request.							
If you need to submit a new request, please visit If you are a registered user, you can manage this LOA by visiting sdge.com/loa.								
If you have any questions or concerns, email us at <u>CIM@sdge.com</u> . Please do not reply to this email.								
If you are a registered user, you can manage this LOA by visiting If you are a registered user, you can manage this LOA by visiting sdge.com/loa								
Thank you, SDG&E CIM								
Interested in solar?								
If you have questions about installing solar on your home, the "California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar Consumer Public Utilities Commission (C	Solar Consumer Protection Guide. The Gu	ide incli	udes					
Available solar programs for income-qualifying customers								
False Claims to Watch Out For								
Your Rights								
Questions to Ask a Solar Provider Before Signing a Contract								
Solar Financing Options								

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How to update your email address in an existing LOA

If you wish to update your contact email address within an LOA, you may do so by following these steps:

- 1. Log in to CtS via (<u>www.sdge.com/loa</u>) and find the email address that you wish to update.
- 2. Click on the **pencil icon** displayed next to the email address.

cis	😑 LOA-0000040193 🖒			Close	Print Filled LOA Print All Added Service Accounts		→
•	LOA Actions -	Customer Information				Files & documents (1)	0
	Purpose EPA Benchmarking Start Date	Type Email address	Andreas and a second se	Full Name Phone number	NAME ADDRESS OF ADDRES		1
	End Date Status PENDING-CUSTOMER SIGNATURE Created	Mailing Address Customer Signed Date	Million Constanting	Extension			
	Details	Service Account Informa	tion		Ø Fields C Refresh		
		Service Account Number	♥ Service Address	⊽ Serv	vice City $ arr arr arr arr arr arr arr ar$		
		Primary Third Party/DRP	Information				
		Full Name Email address		Organization Name Mailing Address			
		Phone number Extension	- 1	Primary Third Party/DRP Signed Date			
-		Lange Langes					

3. Enter the new email address in the textbox provided and click 'Save.'

cts	COA-0000040193 分		Close	e Print Filled LOA Print All Added Service Accounts		∣→
	LOA Actions -	Customer Information			Files & documents (1)	¢
	Purpose EPA Benchmarking Start Date End Date Status PENDING-CUSTOMER SIGNATURE	Type Email address Mailing Address Customer Signed Date	Full Name Phone number Extension	-		1
	Created	Service Account Information		Ø Fields ☐ C Refresh		
		Service Account Number	▼ Service Address ▼	Service City 👻		
		Primary Third Party/DRP Information	Organization Name			
		Email address Cancel Save	Mailing Address			
		Phone number	Primary Third Party/DRF Date	P Signed		
PK		Extension				



SDG&E Letter of Authorization Email Address Update 🝃 Intex 🛪		ē
do-not-reply-loa@sdge.com	\$	4
A Notification From SDG&E Consent to Share Portal		
This email is to inform that the email address on the following Letter of Authorization (LOA) case(s) was updated recently.		
LOA ID New Email Old Email		
If you have any questions or concerns, email us at CIM@sdge.com. Please do not reply to this email.		
If you are a registered user, you can manage this LOA by visiting sdge.com/loa.		
Thank you, SDG&E CIM		
Interested in solar?		
If you have questions about installing solar on your home, the "California Solar Consumer Protection Guide" is available from your solar contractor or through the California Public Utilities Commission (CPUC) at: California Solar (important information on:	Consumer Protection Guide. The Guide includ	les
Available solar programs for income-qualifying customers False Claims to Watch Out For Your Rights Questions to Ask a Solar Provider Before Signing a Contract Solar Financing Options		

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The new email address will be updated, and you will receive an email at your old and new email addresses.



How to request information or customer data once LOA has reached active status

Once an LOA has been processed and reached an Active status, you may now request the desired customer information or data. Below are the steps to follow:

- 1. Access Consent to Share (CtS) profile:
 - a. Visit <u>www.sdge.com/loa.</u>
 - b. Select "Create a new LOA or Register as Third Party".

eate a new LOA as a Customer	Create a new LOA or Register as a Third Party
ister for Consent to Share as a Cu	stomer

- c. Insert your login credentials.
- 2. Select Desired Active LOA (Letter of Authorization):
 - a. Once you're on the CtS dashboard, locate and select the active LOA for which you want to acquire customer information or usage interval data.

Cre	eate an LOA															
~M	ly worklist		ī	Dou	ble click on acti ID to open LC											
	C Refres	sh														
	Select	LOA ID	Ŧ	External Status 👳	Internal Status 👳	LOA Type 葉	Purpose of LOA =	Submission Process 후	Start Date ╤	End Date ╤	Customer ≡ name	Customer Organization ╤ Name	Primary Third Party/DRP ╤ Name	Primary Organization ╤ Name	Secondary Third Party/DRP ╤ Name	Secondary Organizatio Name
		-		Active	Active	Standard CISR	Seeking to Act on Behalf of Customer	Electronic	2/23/23	2/23/26	-	-	-			
				Active	Active		Third Party Demand Response Program	Electronic	10/27/22	12/31/99		-				

- 3. Navigate to the "Go" Button:
 - a. On the left side of the dashboard panel, look for the "Go" button and click on it.



9	SDGE					Search Site	ent To Share
cts	😑 LOA 🏠 🏠				Close Print Filled LOA Print All Added Service Accounts		→
Ð		Customer Information				Files & documents (4)	0
	To do	Туре	Business	Organization Name	100001000	LOA-C	×
Q	the second secon	F. Name	100.000	Titie	President		1
€	· · · · · · · · · · · · · · · · · · ·	Email address		Phone number	10.00.000		
*	DataDisclosure (Tier 3) • Hig Go	Malling Address	2092 Berry Street Lemon Grove, CA 91945 USA	Extension	an.		
0	LOA Actions -	Customer Signed Date	02/23/2023				1
	Purpose Seeking to Act on Behalf of Customer	Service Account Inform	ation				
ıtl	Start Date 02/23/2023 End Date 02/23/2026	Service Account Num	ber = Service Address	Ŧ	Service City =	-	
Ô	Status ACTIVE	1	per = Service Address	Ŧ			
œs	Internal Status					🕆 Tags (0)	0
	ACTIVE-AWAITING THIRD PARTY DATA REQUEST						
	Assigned DefaultWB	Primary Third Party/DR	P Information			No items	
	Created	Full Name	Terrar Terrary	Organization Name	1000.00		
	Updated	Email address	2 C	Mailing Address			
	Time in Queue 576	Phone number		Primary Third Party/DRP Sign	ad .		
	Details			Date	~		
	Special Instructions	Extension	-				
	Validation Results	LOA Case Information					
PP	Case Log 👻	LOA Type	Standard CISR	Start Date			Ę

- 4. **Choose** the appropriate authorized fields:
 - a. A list of authorized options will populate on your screen.
 - b. Select the authorized options for which you want to acquire information/ data (example for interval usage data select box #1).
- 5. Enter Date Range:
 - a. Specify the date range for which you need interval data.
 - i. Date range can be a specific day, week, month, or year.
 - b. Ensure to input the correct start and end dates.
 - c. If no date range is provided, data will be provided for the last 12 historical months.

6. Submit Your Request:

- a. Click on the "Submit" button.
- b. Your request will then be processed.



SDGE							Search Site	nsent To
					Close Print Filled LOA	Print All Added Service Accounts		
LOA Actions	•	This LOA has the following info Authorized Data	rmation authorized for sharing. Please indicate the data that y	ou need disclosed, and our LOA agents will proce	s your request and send your data to you or pro	wide access as needed.	Files & documents (4)	.) ≮
Purpose Start Date	Seeking to Act on Behalf of Customer	2. EPA Benchmarki	ng					
End Date		Special Instructions to LOA Ag	ent					
Status Internal Status	ACTIVE	Insert any	specific instruction here. 2			3		
	WAITING THIRD PARTY DATA REQUEST		-					
Assigned							and the second second	
Updated		Cancel			1	Save and Close Submit	6	100
Time in Queue	-					-	T GOILG	
		Customer Information						
Details		Туре		Organization Name	Teacher States		👚 Tags (0)	
Special Instruct	tions	Full Name		Title				
Validation Resul	its	Email address		Phone number			No Items	
Case Log		Mailing Address	100.00 m	Extension				
Comments		Customer Signed Date						
Data Disclosure	Information							
Notification Log	3	Service Account Inform	nation					
		Service Account Nur	nber = Service Ad	dress =	Service City	=		

- 7. Data Delivery via Electronic Data Transfer (EDT):
 - a. The requested interval usage data will be sent to the email address associated with your LOA.
 - b. Keep a close eye on your email inbox for a data delivery notification.
 - c. If an email address was not provided within the LOA, then you can email 3rdPartyReq@sdge.com to advise of the email address to where data should be sent to.

Questions?

If you have any questions or concerns, email us at CIM@sdge.comor visit us at sdge.com/loa.