

# Consent to Share User Manual

USER MANUAL FOR THIRD PARTIES

## Table of Contents

How to register.....	3
Forgot Password.....	5
How to view and update your profile information .....	9
Update Password.....	10
Update Email.....	11
Update Profile.....	13
How to create a Standard CISR LOA electronically .....	15
How to create a CISR-DRP LOA electronically .....	30
How to create a Non-Standard LOA electronically .....	41
How to upload a signed LOA .....	54
Signing an LOA initiated by the customer (Snap start process) .....	61
Option A - Click on the email link.....	61
Option B - Log in to CtS.....	68
Option C - Print the LOA and sign on paper.....	75
How to Revoke an active authorization? .....	77
How to copy an existing LOA and create a new one.....	81
How to cancel a request before its active? .....	86
How to update your email address in an existing LOA .....	88
How to request data once LOA has reached active status.....	90
Questions?.....	92

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## How to register

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1. Choose **Log in to the Portal** from the [www.sdge.com/loa](http://www.sdge.com/loa) website. Select **Third Party Login**. Click on **'Register for Consent to Share'** from the login screen.



Consent To Share

Please login with your username and password.

Enter your email address \*

Forgot password?

Password \*

Login

Register for Consent to Share

2. Complete the registration form.



Consent To Share

Register with your email and password:

First name \*    Last name \*

Phone    Extension

Company Name

Mailing address

City

State

Postal code

United States

Email \*

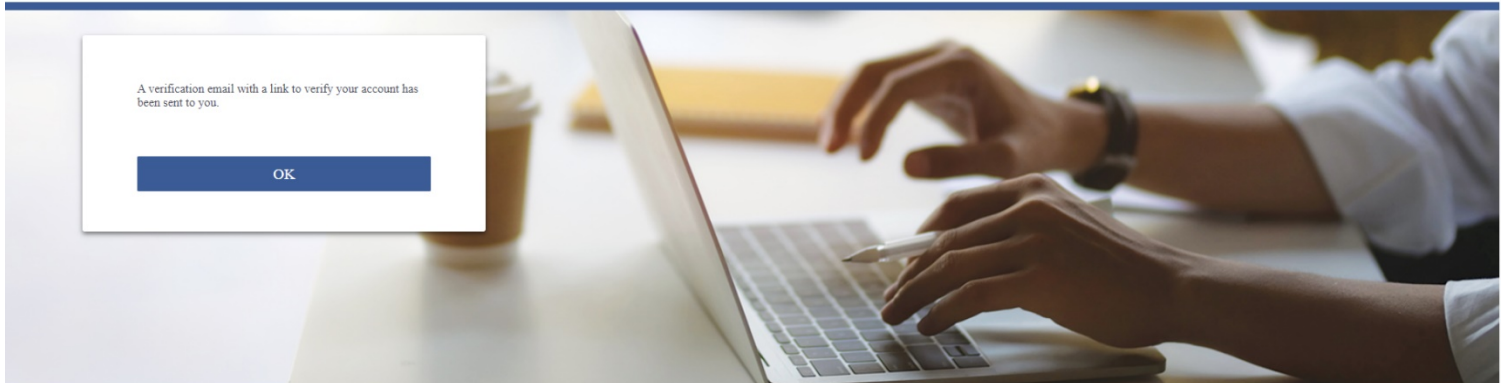
Password \*    Confirm password \*

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. \*

Submit

Have an account already?

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



Thank you for registering with Consent to Share. In order to complete your registration and update the email address, please click [here \[accounts.us1.gigya.com\]](https://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](mailto: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](https://sdge.com/privacy)

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.

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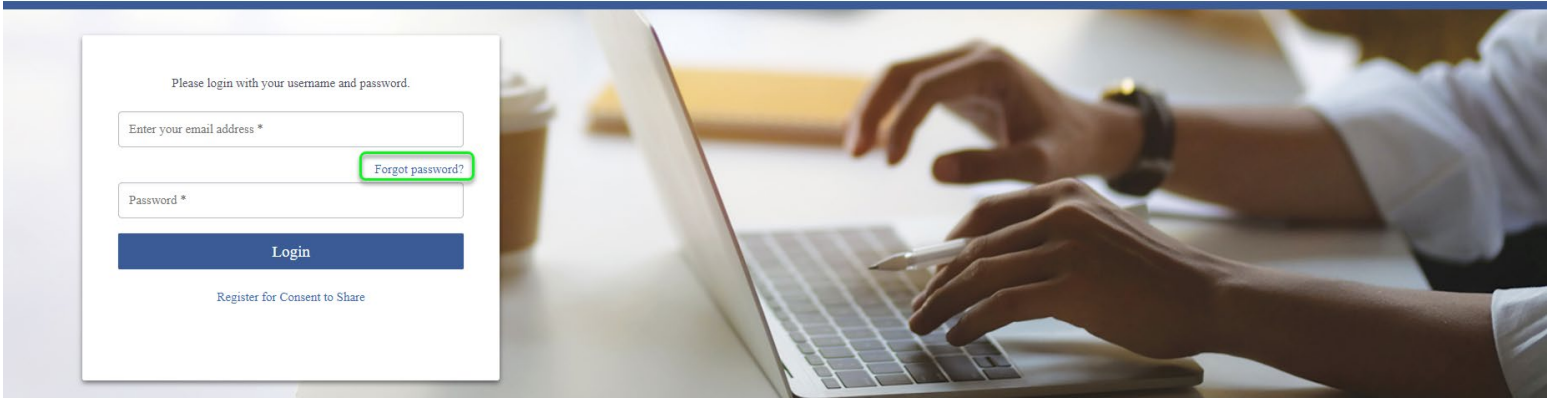
## Forgot Password

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



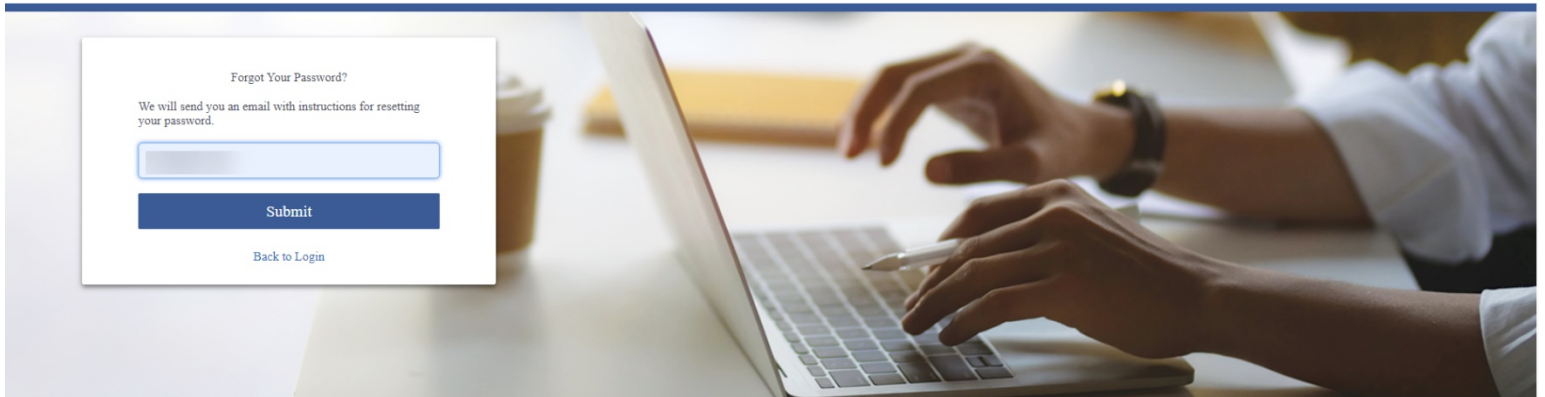
Consent To Share



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



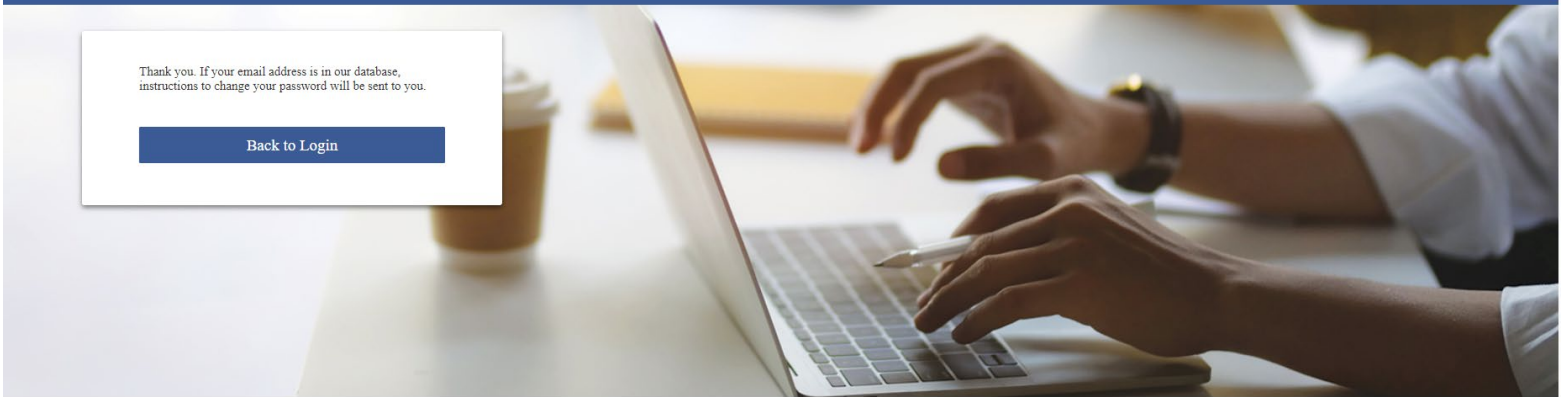
Consent To Share



3. Confirmation message will be displayed.



Consent To Share



4. Click the link in the email.

SDG&E Consent to Share Password Reset

**From:** [no-reply-cts@ext.sdge.com](mailto:no-reply-cts@ext.sdge.com)

Hello [REDACTED],

We have received your request to reset your Consent to Share password. In order to complete your password reset, please click [here](#).

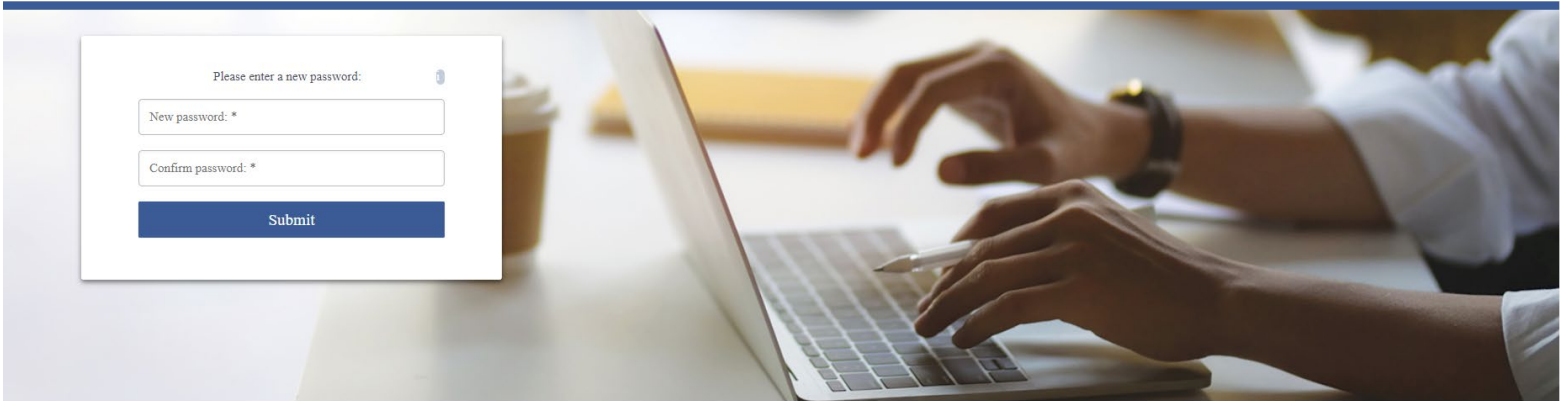
If you did not request a password reset, please disregard this message. If you have any questions or concerns, email us at [CIM@sdge.com](mailto:CIM@sdge.com). Please do not reply to this email.

Thank you,

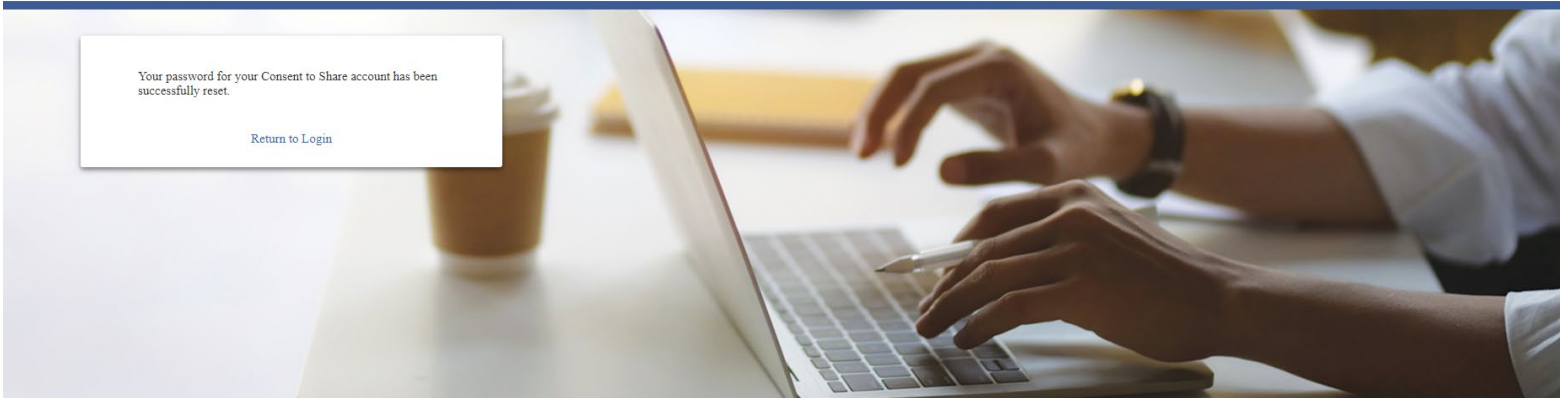
SDG&E CIM

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](https://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:** [no-reply-cts@ext.sdge.com](mailto:no-reply-cts@ext.sdge.com)

**Subject:** SDG&E Consent to Share Password Reset

Dear [REDACTED],

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](mailto: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](https://sdge.com/privacy)



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## How to view and update your profile information

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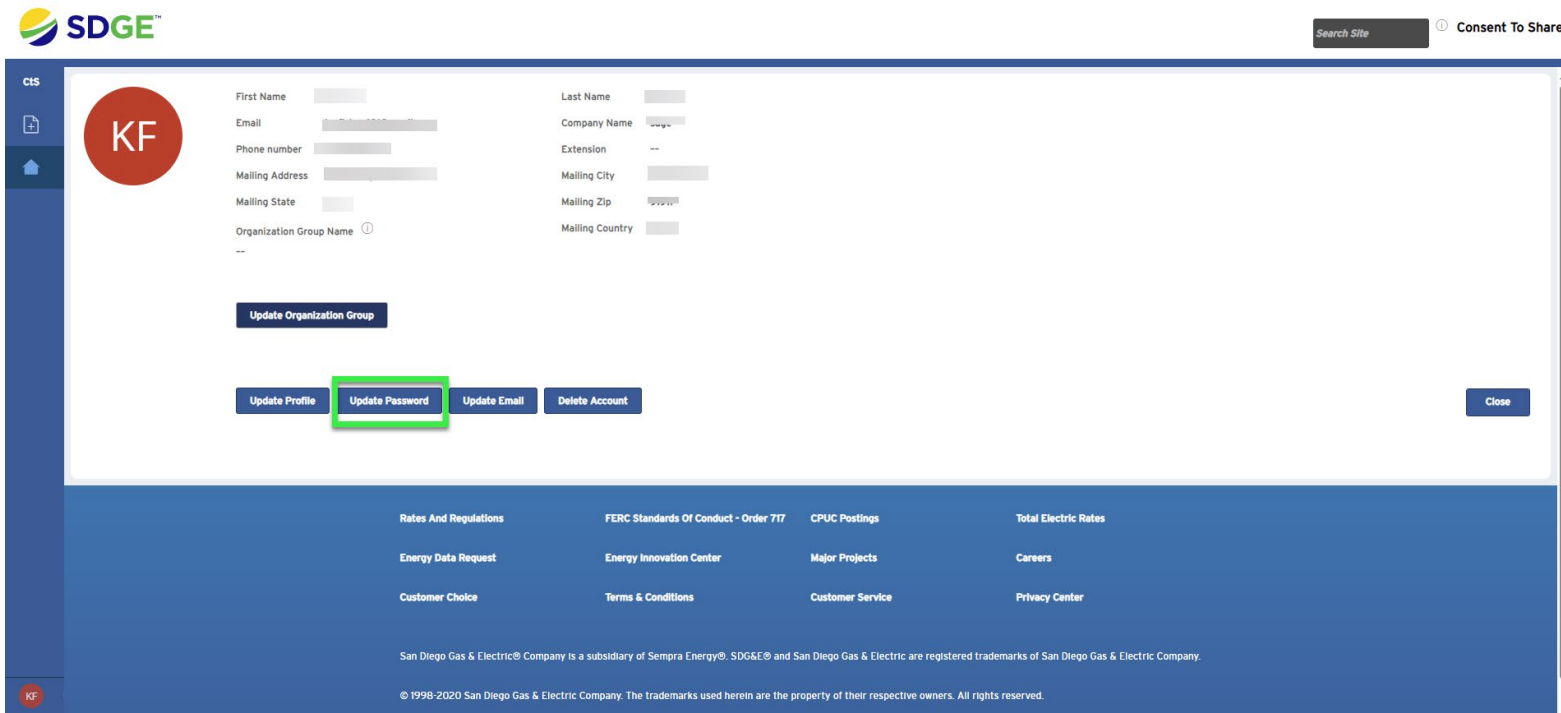
You may view your profile information from on the bottom left corner **'My Profile.'**



The screenshot displays the SDGE user interface. On the left is a dark blue sidebar with navigation options: "Create LOA" (with a plus icon), "Home" (with a house icon), and a user profile section at the bottom. The profile section shows a red circle with the initials "KF", a greyed-out name, and a green-bordered dropdown menu with "My Profile" selected and "Log off" as an option. The main content area on the right shows a table with columns for "LOA Status", "LOA Type", and "Purpose". Below the table is a grey "Update Email" button. At the bottom of the main area, another table is partially visible with columns for "LOA Status", "LOA Type", and "Purpose". The bottom row of this table contains the values "Active", "CISR-DRP", and "Third Party Demand R".

## Update Password

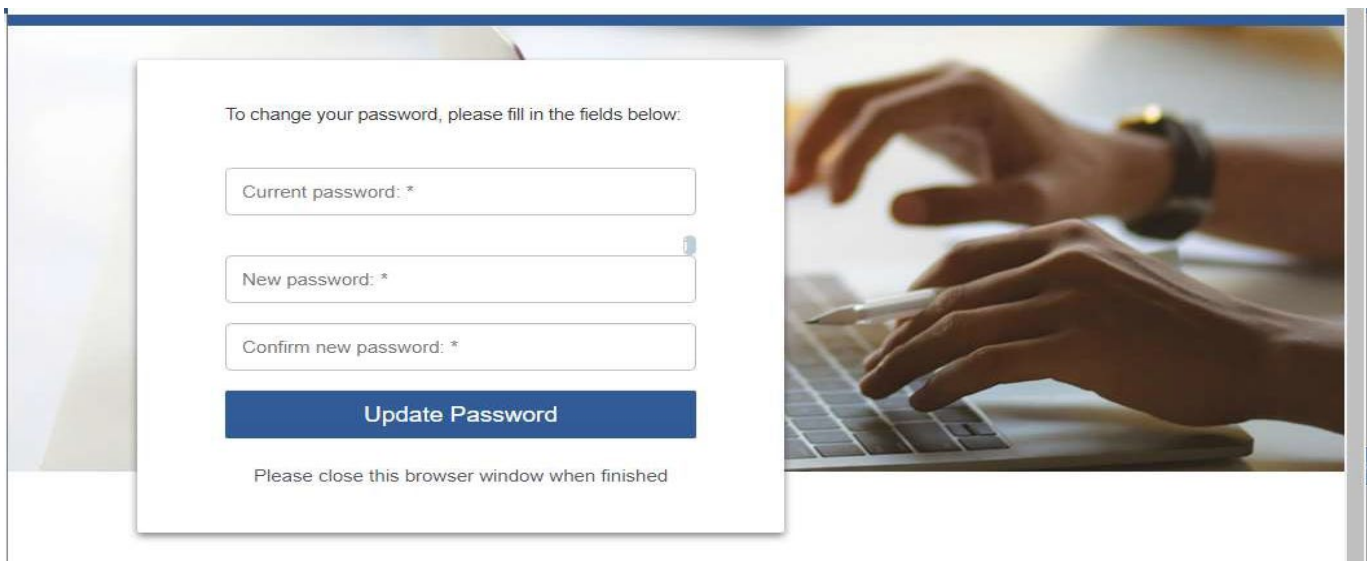
1. In the **Profile** screen, click **'Update Password.'**



The screenshot shows the SDGE Profile page. The SDGE logo is in the top left. A search bar and "Consent To Share" link are in the top right. The profile information is displayed in a grid format, including fields for First Name, Last Name, Email, Company Name, Phone number, Extension, Mailing Address, Mailing City, Mailing State, Mailing Zip, Mailing Country, and Organization Group Name. Below the profile information are four buttons: "Update Organization Group", "Update Profile", "Update Password" (highlighted with a green box), "Update Email", and "Delete Account". A "Close" button is in the bottom right corner. The footer contains a grid of links: Rates And Regulations, FERC Standards Of Conduct - Order 717, CPUC Postings, Total Electric Rates, Energy Data Request, Energy Innovation Center, Major Projects, Careers, Customer Choice, Terms & Conditions, Customer Service, and Privacy Center. At the bottom, there is a copyright notice: "San Diego Gas & Electric® Company is a subsidiary of Sempra Energy®. SDG&E® and San Diego Gas & Electric are registered trademarks of San Diego Gas & Electric Company. © 1998-2020 San Diego Gas & Electric Company. The trademarks used herein are the property of their respective owners. All rights reserved."

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

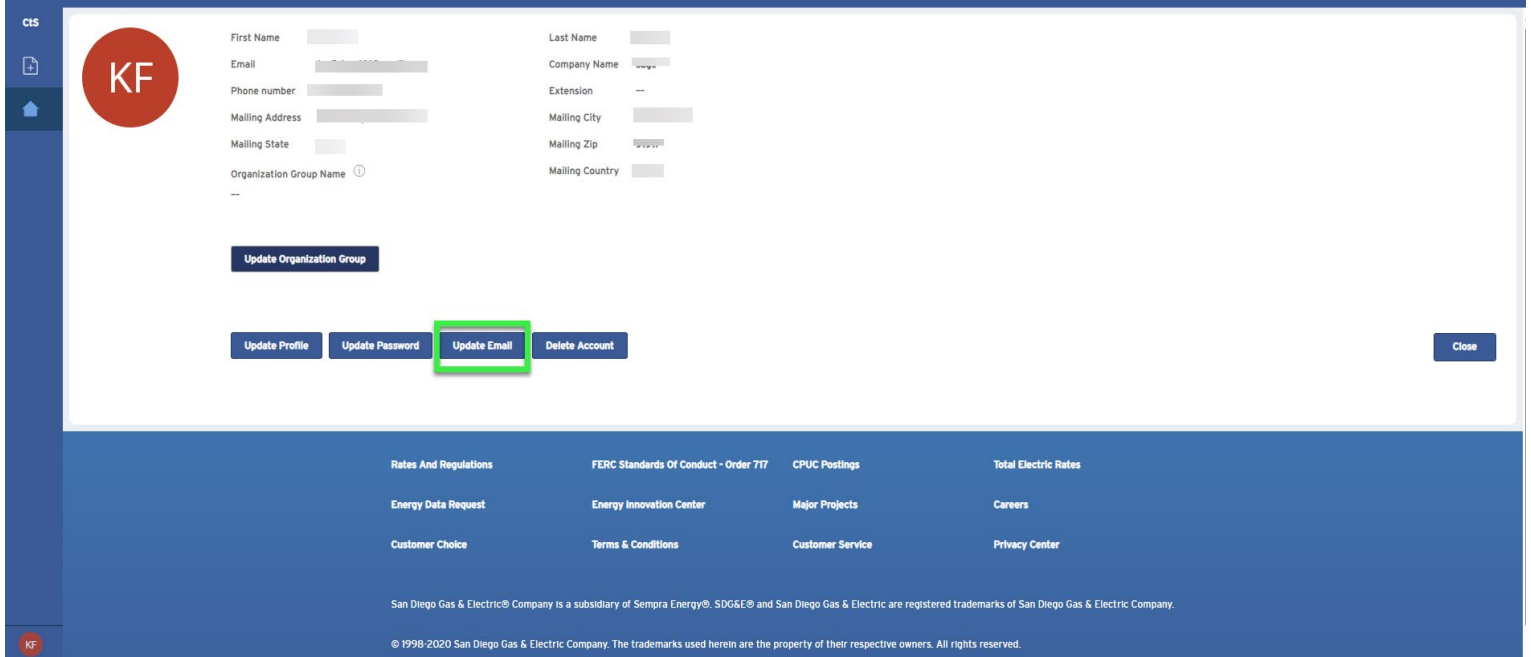
After updating, close the window.



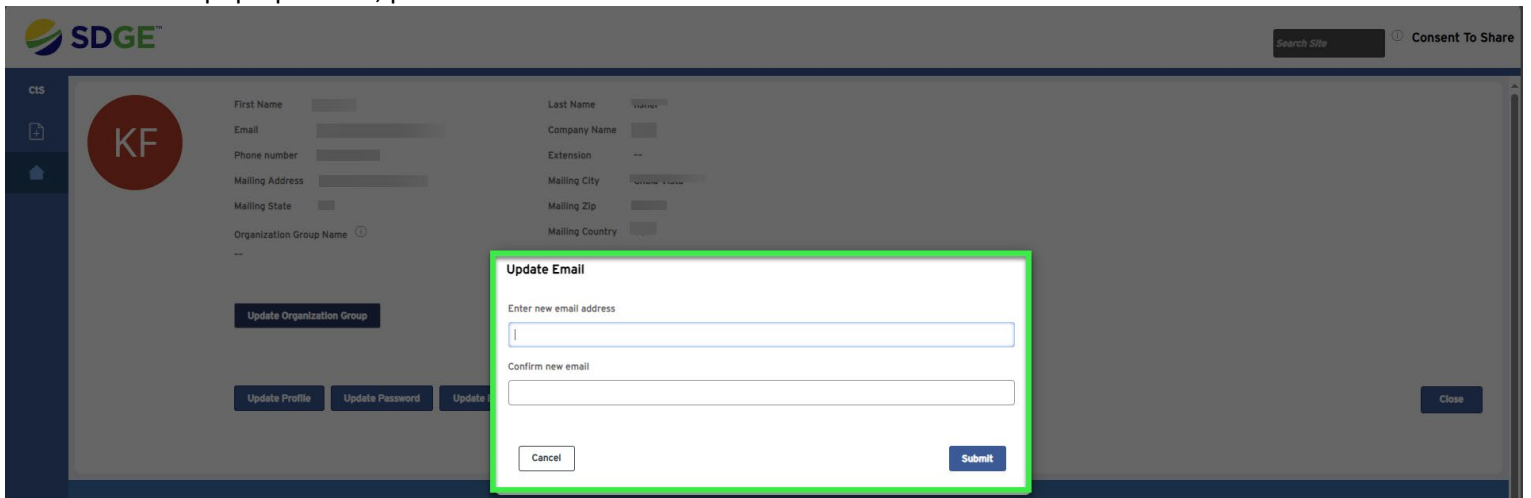
The screenshot shows a dialog box for updating a password. The text reads: "To change your password, please fill in the fields below:". There are three input fields: "Current password: \*", "New password: \*", and "Confirm new password: \*". Below the fields is a blue button labeled "Update Password". At the bottom of the dialog box, it says "Please close this browser window when finished". The background of the dialog box shows a person's hands typing on a laptop keyboard.

### Update Email

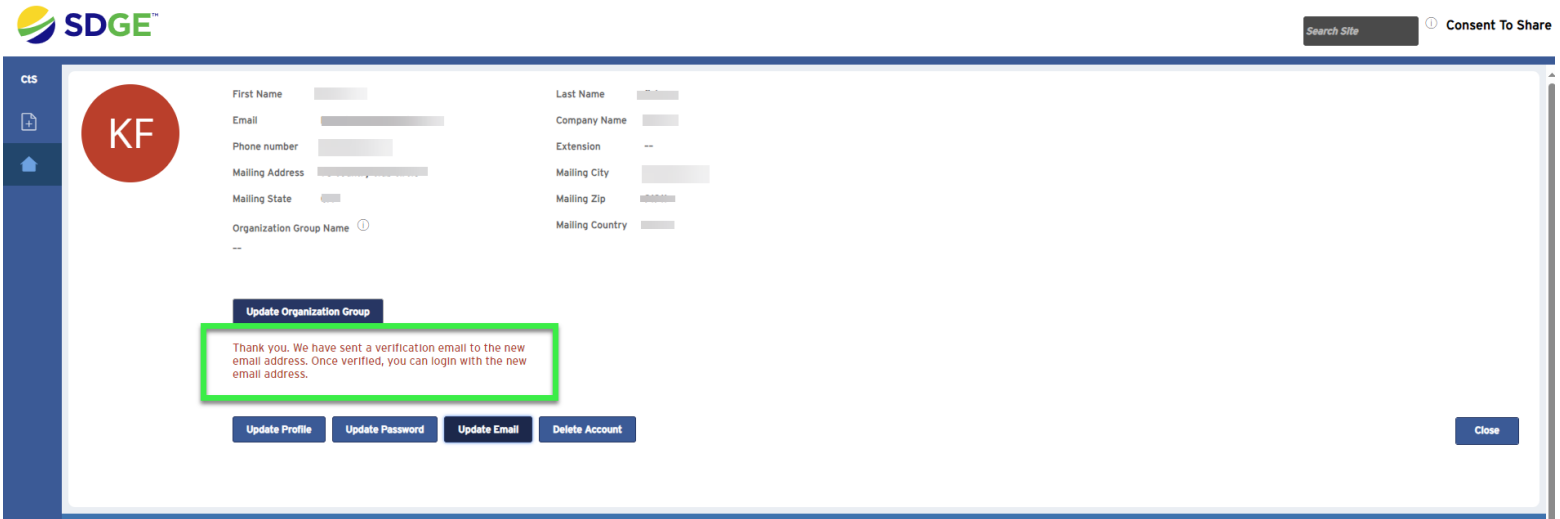
1. In the Profile screen, click **'Update Email.'**



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

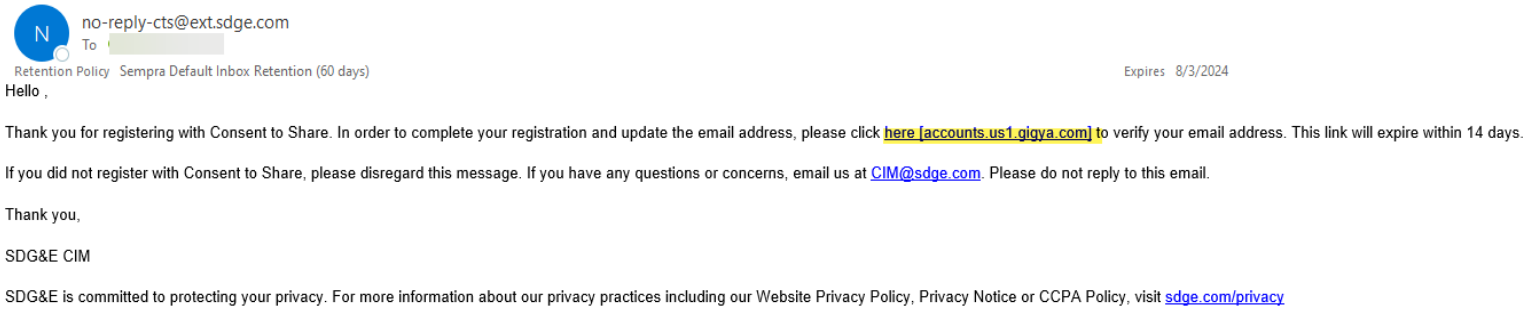


3. A confirmation message will be displayed on screen.

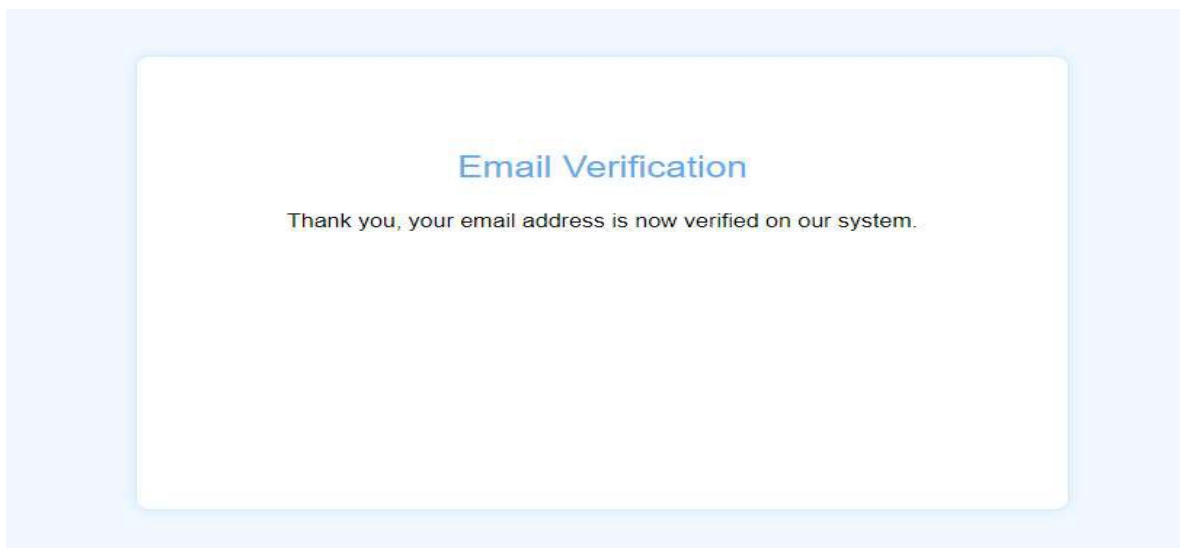


4. Click on the verification link from your email to complete the update process.

[EXTERNAL] SDG&E Consent to Share Registration Verification

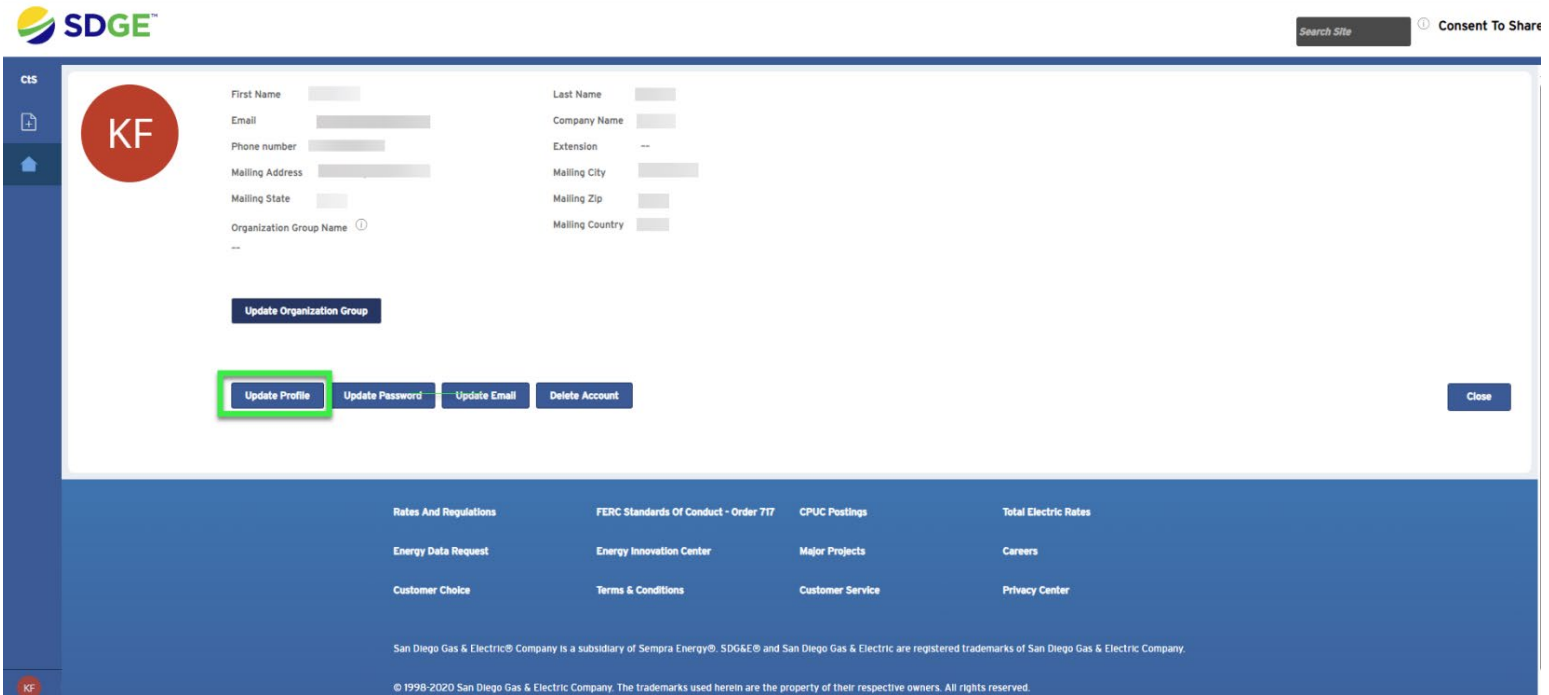


5. Confirmation will be displayed, and you may now log in with your new email address.

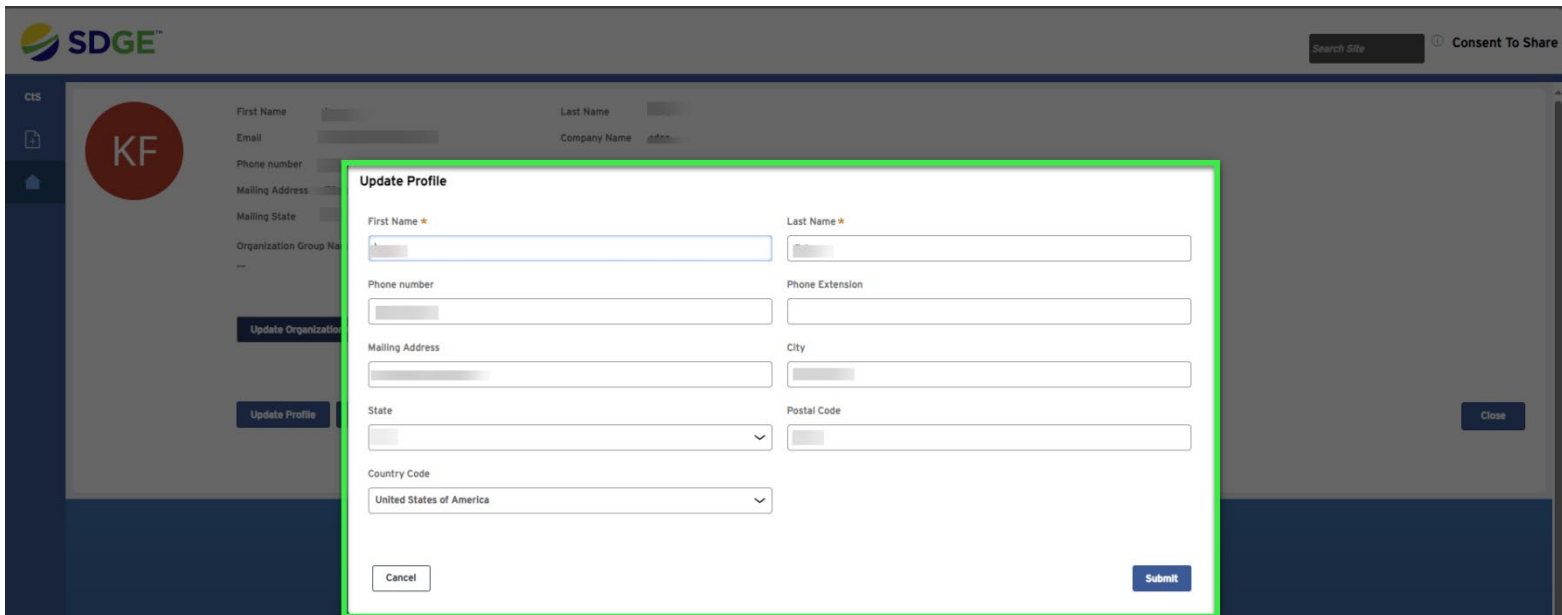


## Update Profile

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



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



3. A confirmation message will be displayed.

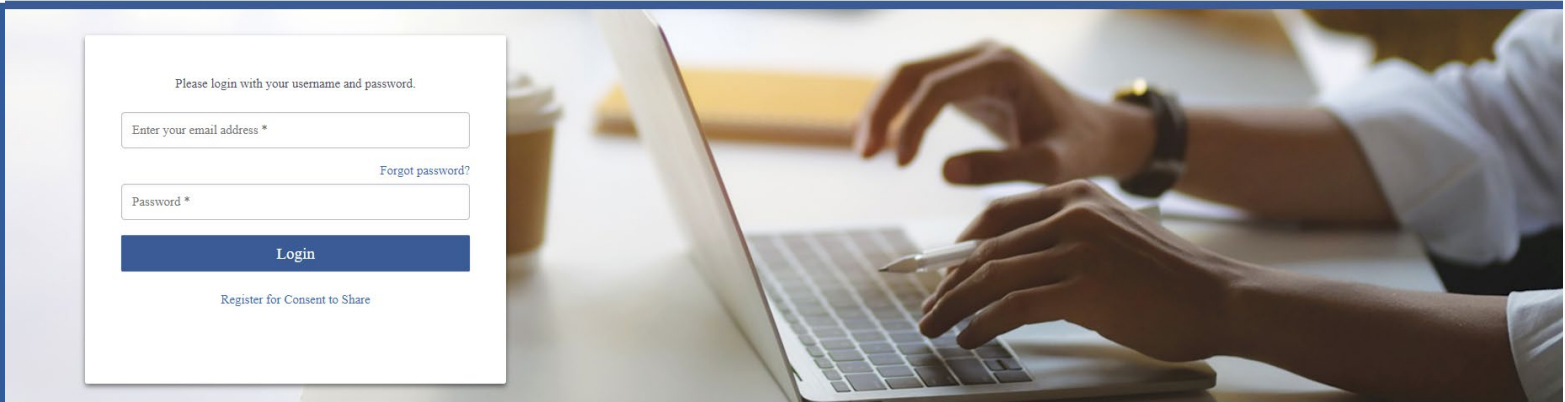
The screenshot displays the SDGE user profile management interface. At the top left is the SDGE logo. In the top right corner, there is a search bar labeled "Search Site" and a "Consent To Share" link. The main content area features a profile card for a user with the initials "KF". The profile card includes a grid of input fields for personal and contact information: First Name, Last Name, Email, Company Name, Phone number, Extension, Mailing Address, Mailing City, Mailing State, Mailing Zip, Organization Group Name, and Mailing Country (set to USA). Below the form is a blue button labeled "Update Organization Group". A green-bordered box highlights a confirmation message: "Thank you. Your profile information has been updated successfully." Below this message are four blue buttons: "Update Profile", "Update Password", "Update Email", and "Delete Account". A "Close" button is located in the bottom right corner of the profile card.

## How to create a Standard CISR LOA electronically

1. Choose **Log in to the Portal** from the [www.sdge.com/loa](http://www.sdge.com/loa) website. Select **Third Party Login**. Use your **Consent to Share** application credentials.



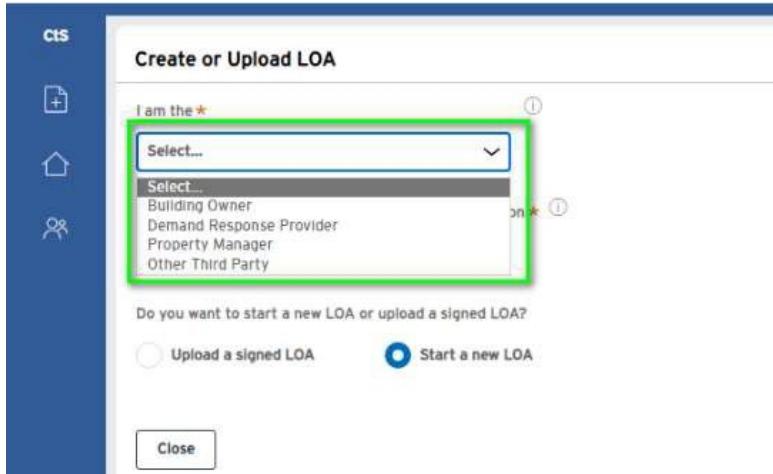
Consent To Share



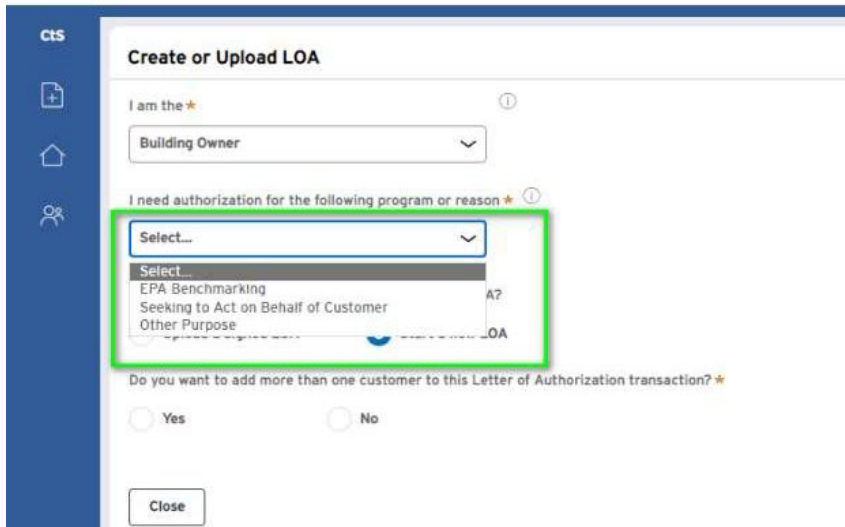
<input type="checkbox"/>	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000
<input type="checkbox"/>	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000
<input type="checkbox"/>	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000
<input type="checkbox"/>	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000
<input type="checkbox"/>	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000	100-000000000

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

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



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 option is selected, a Standard LOA will be initiated which is also called a Standard CISR form.





- 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.'**

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

- 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 CIS 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)? \*

Yes  
 No

How long would you like to share data with your Third Party? \*

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 [3rdPartyReq@sdge.com](mailto:3rdPartyReq@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? \*

- 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.

**Important:** 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 customer may 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.**

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.

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 [link](#). 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.

The screenshot shows the 'Service Address Information' section of the SDGE web interface. On the left, there is a sidebar with 'LOA Actions' and a table with columns for Purpose, Start Date, End Date, Status (DRAFT), and Created. The main content area has a header 'Service Address Information' and a sub-header '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.' Below this is a table with columns for Service Account Number, Service Address, and Service City. A red circle '1' points to the 'Add account number' button. Below the table, there is a section for downloading an Excel template, with a red circle '2' pointing to the 'Bulk Upload Service Accounts' button.

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**

Organization Name \* [ ] Mailing Country \* [ United States of America ]

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
- Hard copy via US Mail (if applicable)
- Fax

Email address \* [ ]

Re-Enter Email Address \* [ ]

Close Save and Close Next

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

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.**

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.

**AUTHORIZATION TO: RECEIVE CUSTOMER INFORMATION OR ACT ON A CUSTOMER'S BEHALF**

THIS IS A LEGALLY BINDING CONTRACT—READ IT CAREFULLY (Please Print or Type)

I, \_\_\_\_\_ (NAME) \_\_\_\_\_ (TITLE OF APPLICABLE) of \_\_\_\_\_ (NAME OF CUSTOMER OF RECORD) (Customer) have the following mailing address \_\_\_\_\_ (MAILING ADDRESS) \_\_\_\_\_ (CITY) \_\_\_\_\_ (STATE) \_\_\_\_\_ (ZIP) and do hereby appoint \_\_\_\_\_ (NAME OF THIRD PARTY) of \_\_\_\_\_ (MAILING ADDRESS) \_\_\_\_\_ (CITY) \_\_\_\_\_ (STATE) \_\_\_\_\_ (ZIP) to act as my agent and consultant (Agent) for the listed account(s) and in the categories indicated below:

**ACCOUNTS INCLUDED IN THIS AUTHORIZATION:**

1. _____ (SERVICE ADDRESS) _____ (CITY) _____ (STATE) _____ (ZIP) _____ (SERVICE ACCOUNT NUMBER)
2. _____ (SERVICE ADDRESS) _____ (CITY) _____ (STATE) _____ (ZIP) _____ (SERVICE ACCOUNT NUMBER)

(For more than two accounts, please list additional accounts on a separate sheet and attach it to this form.)

**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.

I (Customer) authorize my Agent to act on my behalf to perform the following specific acts and functions (initial all applicable boxes):

- 1. 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 Utility<sup>1</sup>.
- 2. EPA Benchmarking (authorizes usage information to be uploaded to the EPA's ENERGY STAR Portfolio Manager).
- 3. Request and receive copies of correspondence in connection with my account(s) concerning (initial all that apply):
  - a. Verification of rate, date of rate change, and related information;
  - b. Contracts and Service Agreements;
  - c. Previous or proposed issuance of adjustments/credits; or
  - d. 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).
- 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) \_\_\_\_\_

<sup>1</sup> 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 I may be responsible for charges that may be incurred to process this request. Revised 1/2014

**AUTHORIZATION TO: RECEIVE CUSTOMER INFORMATION 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<sup>2</sup> (initial one box only):

- 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).
- 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.
- Authorization is given for the period commencing with the date of execution until \_\_\_\_\_ (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 specified herein.

**RELEASE OF ACCOUNT INFORMATION:**

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 Mail (if applicable).
- Facsimile at this telephone number: \_\_\_\_\_
- Electronic format via electronic mail (if applicable) to this e-mail address: \_\_\_\_\_

I (Customer), \_\_\_\_\_ (print name of authorized signatory), declare under penalty of 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 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 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 harmless, 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 any time by 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).]

\_\_\_\_\_  
AUTHORIZED CUSTOMER SIGNATURE      \_\_\_\_\_ TELEPHONE NUMBER

Executed this \_\_\_\_\_ day of \_\_\_\_\_ MONTH \_\_\_\_\_ YEAR at \_\_\_\_\_ CITY AND STATE WHERE EXECUTED

I (Agent), 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 and from the taking of any action pursuant to this authorization, including rate changes.

\_\_\_\_\_  
AGENT SIGNATURE      \_\_\_\_\_ TELEPHONE NUMBER

COMPANY \_\_\_\_\_

Executed this \_\_\_\_\_ day of \_\_\_\_\_ MONTH \_\_\_\_\_ YEAR

<sup>2</sup> If no time period is specified, authorization will be limited to a one-time authorization. Revised 1/2014

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. **Important:** Make sure to click **'Accept'** after signing so the signature will be accepted on the application.

The screenshot displays the 'Review and Sign' interface for LOA-0000040176. The left sidebar shows 'LOA Actions' with a 'DRAFT' status. The main content area is divided into several sections:

- Customer Contact Information:** Fields for Type, Full Name, Email address, Mailing Address, Phone number, and Extension.
- Service Address Information:** Fields for Service Account Number, Service Address, and Service City.
- Primary Third Party/DRP Contact Information:** Fields for Full Name, Email address, Mailing Address, Organization Name, Phone number, and Extension.
- Customer Actions Authorized:** A list of 9 items with checkboxes. Item 2, 'EPA Benchmarking', is checked. Other items are unchecked.
- Electronic Signature:** A section with a text area containing a signature. Below the signature is a red arrow pointing to an 'Accept' button and a 'Clear' button.

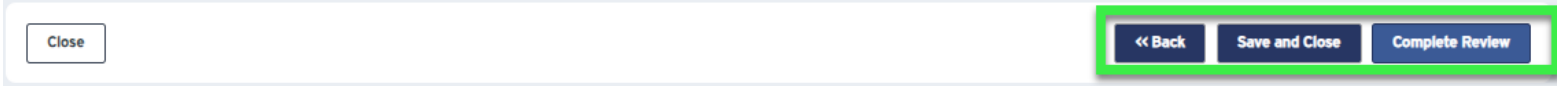
At the bottom of the screen, there are buttons for 'Cancel', '<< Back', 'Save and Close', and 'Complete Review'.



**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.

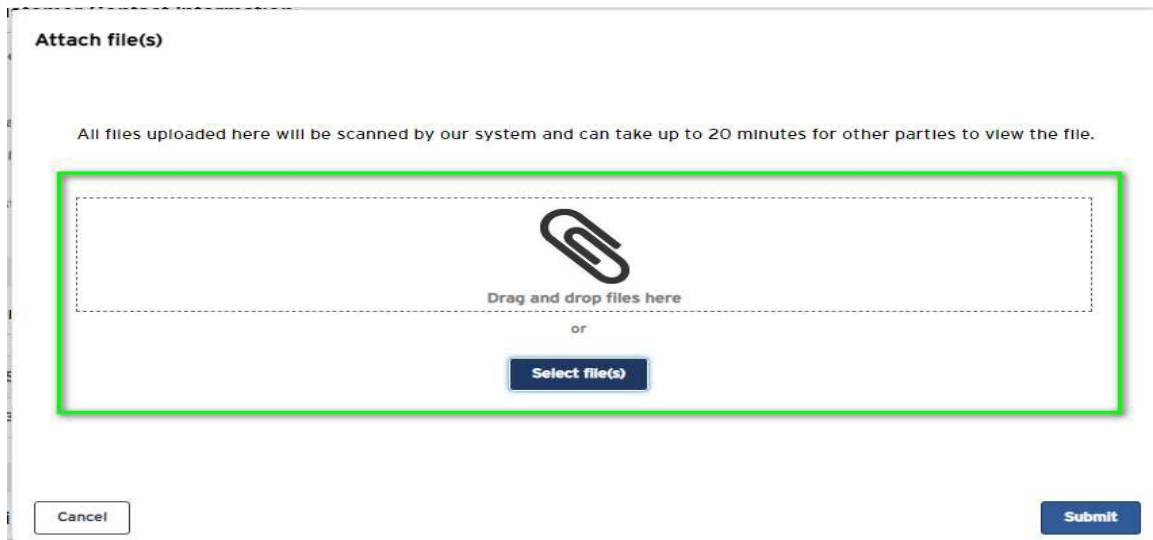
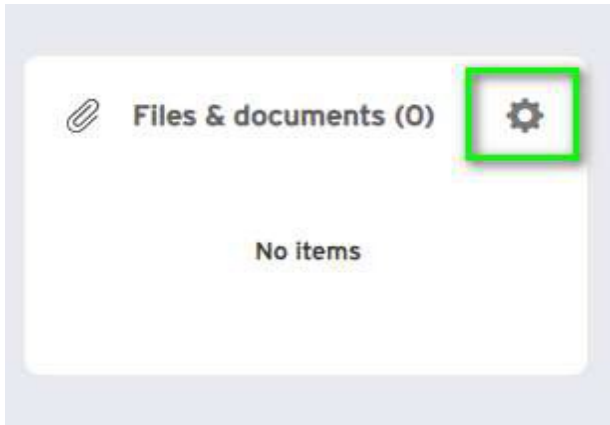


If you would like to make any changes, please use the **'Back'** button at the bottom of the screen.



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**.




Select the files you wish to upload.

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

**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.

  
Drag and drop files here

or


**Select file(s)**

Name *	File	Category	Classification <span>ⓘ</span>	
<input type="text" value="Randy Schwartz_Benc"/>	<input type="text" value="Randy Schwartz_Benchmarking_Full Paper.pdf"/>	<div style="border: 2px solid green; padding: 5px;"><ul style="list-style-type: none"><li>LOA Form</li><li>Select...</li><li>LOA Form</li><li>List of Service Accounts</li><li style="background-color: #e0e0e0;">Identification Proof</li><li>Property/Rental/Lease Agreements</li><li>Utility Bill</li><li>Special Instructions</li><li>Revoke Document</li><li>Other</li></ul></div>	Public	

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

**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.

  
Drag and drop files here

or

**Select file(s)**

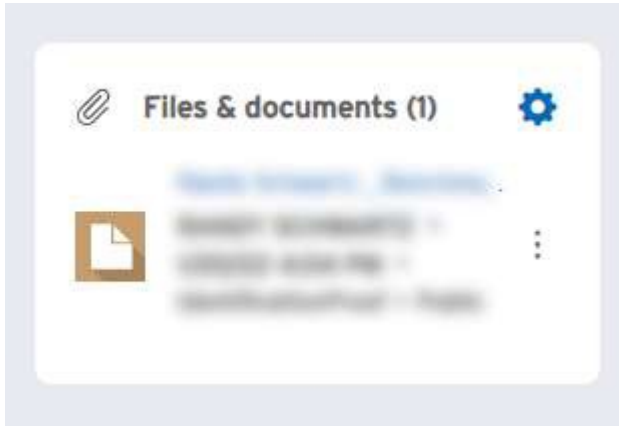
Name *	File	Category	Classification <span>ⓘ</span>	
<input type="text" value="Randy Schwartz_Benc"/>	<input type="text" value="Randy Schwartz_Benchmarking_Full Paper.pdf"/>	Identification Proof	<div style="border: 2px solid green; padding: 5px;"><ul style="list-style-type: none"><li>Private</li><li style="background-color: #e0e0e0;">Public</li></ul></div>	

Files & documents (0) ⚙️

No items

Private - Documents in this classification will be viewable to you and SDG&E only.  
Public - Documents in this classification will be viewable to all users with access to this LOA case.

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.

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.

The box below is for entering data requests or special instructions. Examples 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 500 characters.

Data Request or Special Instructions \*

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 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.

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**.

CIS
LOA-0000253021
Close Print Filled LOA Print All Added Service Accounts

**To do**

D Waiting for Action Go

LOA Actions ▾

Purpose Seeking to Act on Behalf of Customer

Start Date --

End Date --

Status PENDING-CUSTOMER SIGNATURE

Internal Status

Assigned

Created

Updated

Time In Queue --

---

**Details**

Special Instructions

Case Log

Comments

Data Disclosure Information

**Customer Information**

Type	Business	Organization Name	---
Full Name	---	Title	--
Email address	---	Phone number	---
Mailing Address	---	Extension	--
Customer Signed Date	--		

**Service Account Information**

	Service Account Number	Service Address	Service City
1	---	---	---
2	---	---	---
3	---	---	---

**Primary Third Party/DRP Information**

Full Name	---	Organization Name	---
Email address	---	Mailing Address	---
Phone number	---	Primary Third Party/DRP Signed	---



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.

A Notification From SDG&E Consent to Share Portal

Request ID: LOA-000253021

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 [sdge.com/loa](https://sdge.com/loa) and enter your LOA Request ID. If you have any questions or concerns, email us at [CIM@sdge.com](mailto: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](https://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](https://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.

 Signed LOA.PDF 312 KB
  List of Service Accounts.XLSX 8 KB

A Notification From SDG&E Consent to Share Portal

Request ID : LOA-000253021

A Letter of Authorization (LOA) to share customer information of [redacted] 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 Customer Information Management at [cim@sdge.com](mailto: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](https://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](https://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 [\[redacted\]](#). You may also access this LOA by logging into Consent to Share by visiting [www.sdge.com/loa](https://www.sdge.com/loa) and click on "Create a new LOA or Register as a Third-Party".

Request ID: LOA-000253021

If you have any questions or concerns, email us at [CIM@sdge.com](mailto: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](https://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

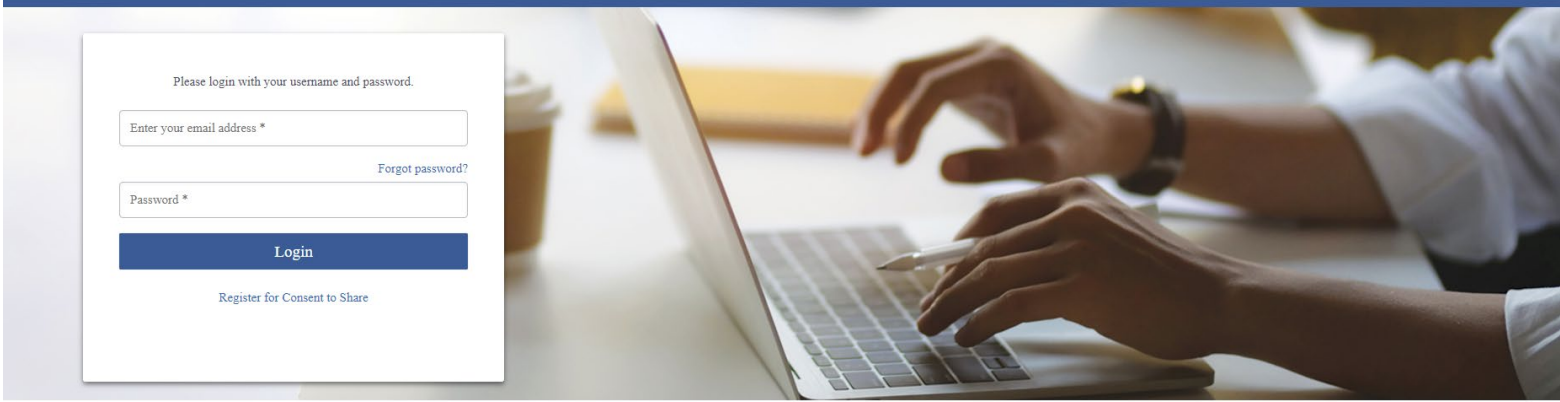
SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit [sdge.com/privacy](https://sdge.com/privacy).

## How to create a CISR-DRP LOA electronically

1. Choose **Log in to the Portal** from the [www.sdge.com/loa](http://www.sdge.com/loa) website. Select **Third Party** Log in. Login using your **Consent to Share** application credentials.



Consent To Share



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



Search Site

Consent To Share

Select	LOA ID	LOA Status	LOA Type	Purpose	Submission Process	LOA Create Date	Start Date	End Date	Customer First Name	Customer Last Name	Delegated Customer Email
<input type="checkbox"/>							--	--			

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

The screenshot shows the 'Create or Upload LOA' form. The first dropdown menu, labeled 'I am the \*', is highlighted with a green box and shows 'Demand Response Provider' selected. Below it, the second dropdown menu, labeled 'I need authorization for the following program or reason \*', shows 'Third Party Demand Response Program' selected. At the bottom, the 'Start a new LOA' radio button is selected.

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

The screenshot shows the 'Create or Upload LOA' form. The second dropdown menu, labeled 'I need authorization for the following program or reason \*', is highlighted with a green box and shows 'Third Party Demand Response Program' selected. The 'Start a new LOA' radio button remains selected.

Standard CISR.

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 and wish to upload it, choose the option **'Upload a signed LOA.'** Then, click **'Create LOA.'**

The screenshot shows the 'Create or Upload LOA' form. The 'Create LOA' button at the bottom right is highlighted with a green box. The form configuration is identical to the previous screenshots, with 'Demand Response Provider' and 'Third Party Demand Response Program' selected.

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.

The screenshot shows the SDGE web application interface. On the left is a navigation sidebar with icons for home, search, and other functions. The main content area is titled 'Contact & Service Account Info' and contains a 'Customer Contact Information' form. The form is highlighted with a green border. The form includes the following fields and options:

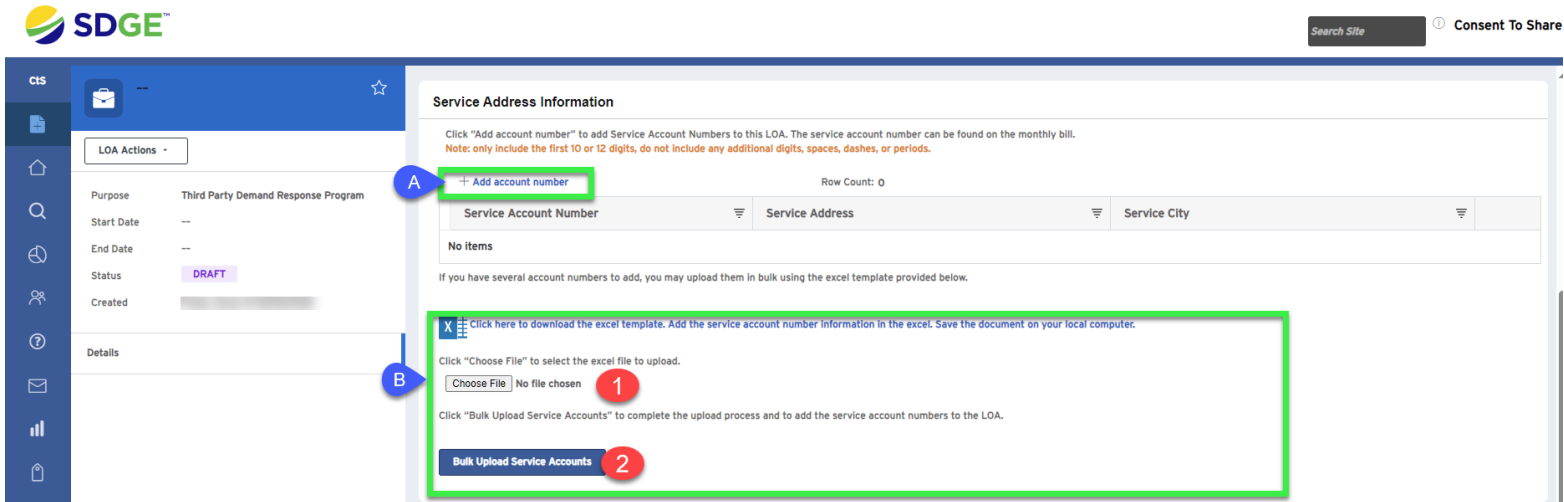
- Is this a Residential or Business Customer? \*
  - Residential
  - Business
- First Name \*  
Please provide a first name
- Last Name \*  
Please provide a last name
- Phone number \*  
Enter a 10 digit phone number
- Extension
- Email address \*  
Please provide a valid email address
- Confirm Email Address \*  
Please confirm the email address

At the top right of the page, there is a 'Search Site' button and a 'Consent To Share' button. Below the form title, there are buttons for 'Close', 'Print Filled LOA', and 'Print All Added Service Accounts'. The status of the LOA is shown as 'DRAFT'.



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.



- 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**.

This screenshot shows the 'Primary Third Party / DRP Contact Information' form. The form is pre-populated with data from the user's profile. A green box highlights the form area. The fields include:

- Organization Name \*
- SDG&E Rule 32 ID \*
- Email address \*
- Phone number \*
- Confirm Email Address \*
- Extension

- 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.

This screenshot shows the 'Secondary Third Party / DRP Contact Information' form. A question is asked: "Will a secondary DRP/Agent need access to the customer data for this program?". The 'Yes' radio button is selected and highlighted with a green box. Below the question are the same form fields as in the previous screenshot:

- Organization Name \*
- SDG&E Rule 32 ID \*
- Email address \*
- Phone number \*
- Confirm Email Address \*
- Extension

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.

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. **Important:** Make sure to click **'Accept'** after signing so the signature will be accepted by the application.

LOA-0000040177
Contact & Service Account Info   Legal Review   Review and Sign

Close   Print Filled LOA   Print All Added Service Accounts

Files & documents (0)

**Customer Contact Information**

Type	Phone number
Full Name	
Email address	

**Service Address Information**

Service Account Number	Service Address	Service City
No Items		

**Primary Third Party/DRP Contact Information**

Organization Name	Rule 32 ID
Email address	Phone number

**Customer Authorizations**

**A TIMEFRAME OF AUTHORIZATION**  
 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, ( ), 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, ( ), 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, ( ), 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. \*

➔ 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

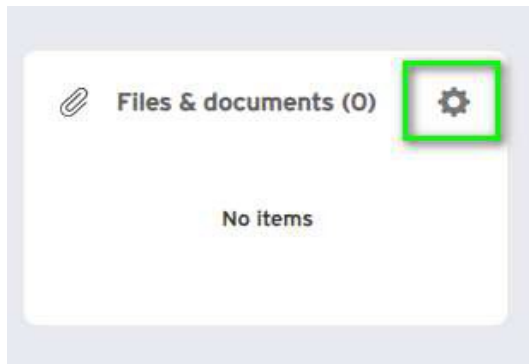
← Back
Save and Close
Complete Review

**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.

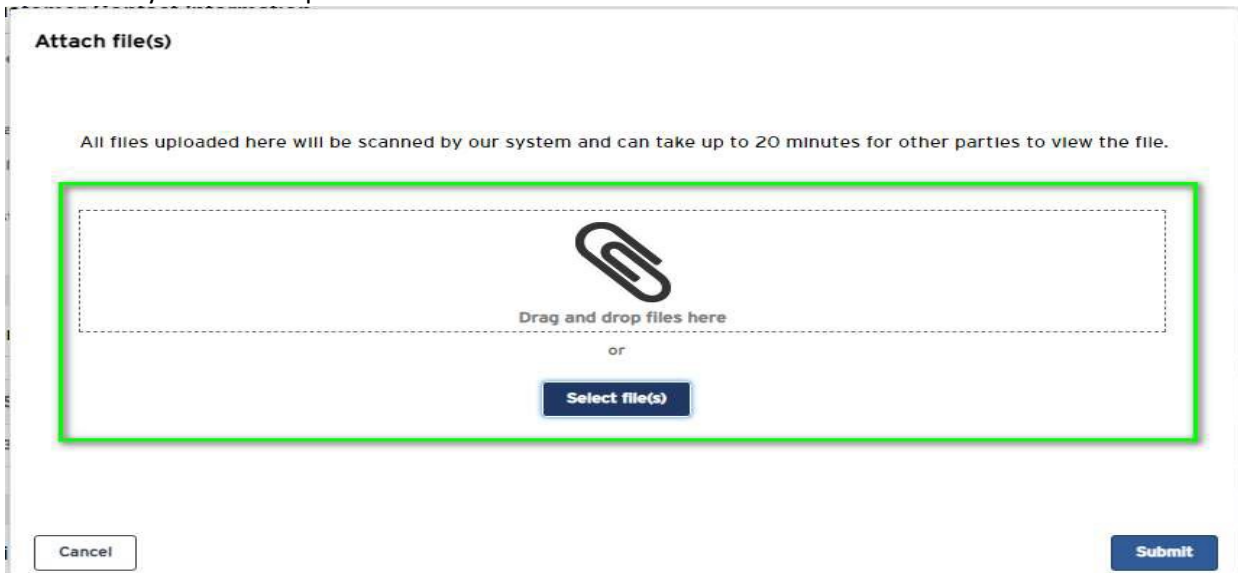


In the same screen, you may also upload any additional documents that you would like SDG&E to review. This is an optional step.

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




Select the files you wish to upload.



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


**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.

  
Drag and drop files here

or


**Select file(s)**

Name *	File	Category	Classification <span>?</span>	
<input type="text" value="Randy Schwartz_Bencl"/>	<input type="text" value="Randy Schwartz_Benchmarking_Full Paper.pdf"/>	<div style="border: 1px solid gray; padding: 2px;"><b>LOA Form</b> <span>▼</span></div> <ul style="list-style-type: none"><li>Select...</li><li>LOA Form</li><li>List of Service Accounts</li><li style="background-color: #0070c0; color: white;">Identification Proof</li><li>Property/Rental/Lease Agreements</li><li>Utility Bill</li><li>Special Instructions</li><li>Revoke Document</li><li>Other</li></ul>	Public <span>▼</span>	

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.

  
Drag and drop files here

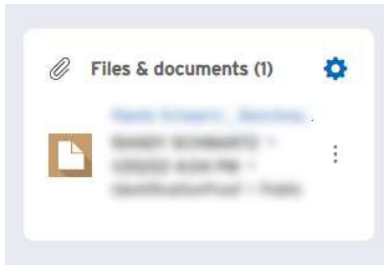
or

**Select file(s)**

Name *	File	Category	Classification <span>?</span>	
<input type="text" value="Randy Schwartz_Bencl"/>	<input type="text" value="Randy Schwartz_Benchmarking_Full Paper.pdf"/>	<input type="text" value="Identification Proof"/>	<div style="border: 1px solid gray; padding: 2px;"><b>Public</b> <span>▼</span></div>	

Private - Documents in this classification will be viewable to you and SDG&E only.  
Public - Documents in this classification will be viewable to all users with access to this LOA case.

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 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.

Email address \*

Re-Enter 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**.

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.

Close Print Filled LOA Print All Added Service Accounts

**Customer Information**

Type	Organization Name
Full Name	Title
Email address	Phone number
Extension	Customer Signed Date

**Service Account Information**

Service Account Number	Service Address	Service City
------------------------	-----------------	--------------

No Items

**Primary Third Party/DRP Information**

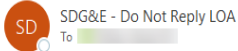
Full Name	Organization Name
Email address	Rule 32 ID
Phone number	Primary Third Party/DRP Signed Date
Extension	

Files & documents (2)

- LOA-0000261006\_KarenFish
- 6/25/24 10:41 AM • LOAForm • Public
- 6/25/24 10:40 AM • Other • Public

## 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 Letter of Authorization Received



Reply



### A Notification From SDG&E Consent to Share Portal

Request ID: LOA-0000261006

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 [sdge.com/loa](https://sdge.com/loa) and enter your LOA Request ID.

If you have any questions or concerns, email us at [csr-drp@sdge.com](mailto:csr-drp@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](https://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](https://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 [REDACTED] 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 [csr-drp@sdge.com](mailto:csr-drp@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](https://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](https://sdge.com/privacy).

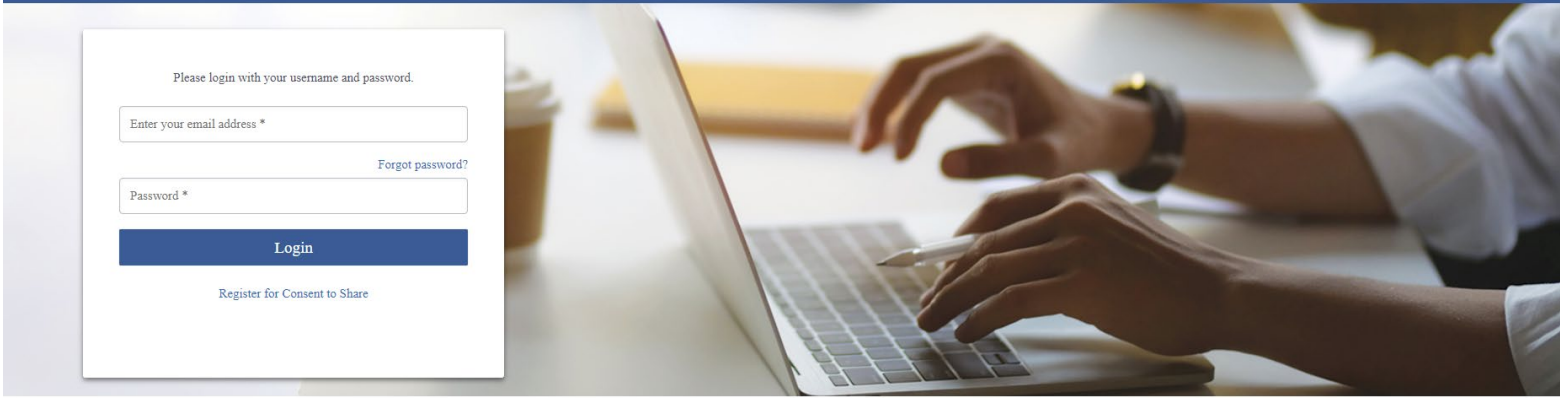


## How to create a Non-Standard LOA electronically

1. Choose **Log in to the Portal** from the [www.sdge.com/loa](http://www.sdge.com/loa) website. Select **Third Party Login**. Log in using your **Consent to Share** application credentials.



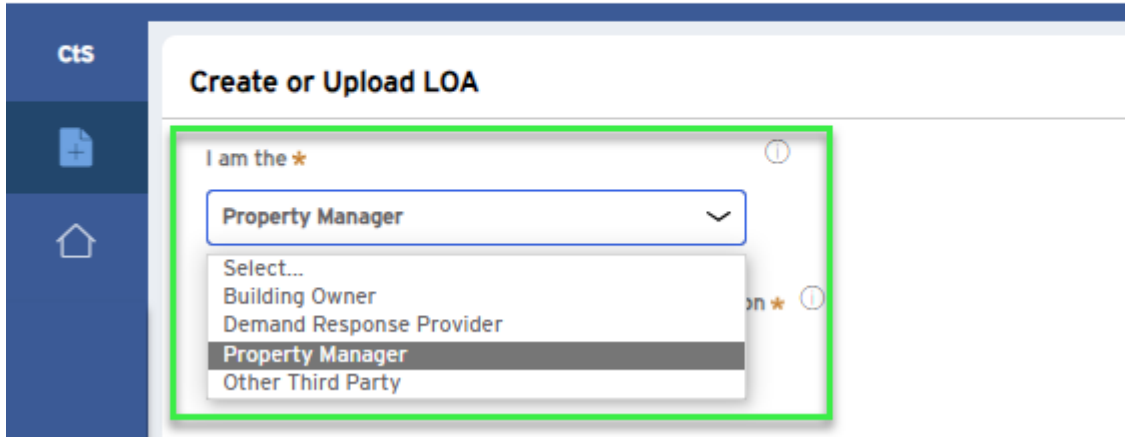
Consent To Share



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

Select	LOA ID	LOA Status	LOA Type	Purpose	Submission 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
<input type="checkbox"/>	LOA-000000000000	Pending Approval	Standard LOA	DRP Authorization	Standard	10/01/2024	10/01/2024	10/01/2024	John	Smith		
<input type="checkbox"/>	LOA-000000000000	Pending Approval	Standard LOA	DRP Authorization	Standard	10/01/2024	10/01/2024	10/01/2024	John	Smith		
<input type="checkbox"/>	LOA-000000000000	Pending Approval	Standard LOA	DRP Authorization	Standard	10/01/2024	10/01/2024	10/01/2024	John	Smith		
<input type="checkbox"/>	LOA-000000000000	Pending Approval	Standard LOA	DRP Authorization	Standard	10/01/2024	10/01/2024	10/01/2024	John	Smith		
<input type="checkbox"/>	LOA-000000000000	Pending Approval	Non-Standard LOA	DRP Authorization	Standard	10/01/2024	10/01/2024	10/01/2024	John	Smith		
<input type="checkbox"/>	LOA-000000000000	Pending Approval	Standard LOA	DRP Authorization	Standard	10/01/2024	10/01/2024	10/01/2024	John	Smith		
<input type="checkbox"/>	LOA-000000000000	Pending Approval	Standard LOA	DRP Authorization	Standard	10/01/2024	10/01/2024	10/01/2024	John	Smith		
<input type="checkbox"/>	LOA-000000000000	Pending Approval	LOA-000	Third Party Standard Response Program	Standard	10/01/2024	10/01/2024	10/01/2024				

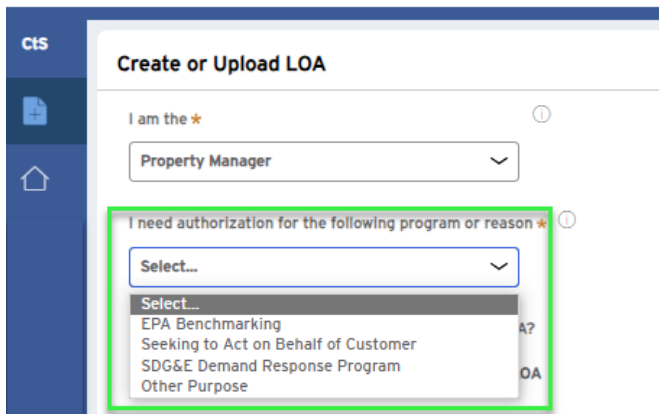
3. A new screen will be displayed where you may identify yourself. **Note:** You cannot submit a non-standard LOA if you are a Demand Response (DR) Provider.



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.



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



The screenshot shows the 'Create or Upload LOA' form. The form includes a sidebar with 'cts', a document icon, and a home icon. The main form has the following fields: 'I am the \*' (Property Manager), 'I need authorization for the following program or reason \*' (Seeking to Act on Behalf of Customer), 'Do you want to start a new LOA or upload a signed LOA?' (Upload a signed LOA selected), and 'I want to upload a \*' (Select...). A tooltip is displayed over the 'I need authorization...' field, listing the following options: 'EPA Benchmarking: Measures energy performance for a building', 'Seeking to Act on Behalf of Customer: Represents the Customer on authorized SDG&E actions', 'SDG&E Demand Response Program: Allows participation in an SDG&E Demand Response Program to manage electric energy use', and 'Other Purpose: For cases where none of the other options apply'. A 'Close' button is located at the bottom left of the form.

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



The screenshot shows the 'Create or Upload LOA' form. The form includes a sidebar with 'cts', a document icon, and a home icon. The main form has the following fields: 'I am the \*' (Property Manager), 'I need authorization for the following program or reason \*' (Seeking to Act on Behalf of Customer), 'Do you want to start a new LOA or upload a signed LOA?' (Upload a signed LOA selected), and 'I want to upload a \*' (Select...). A 'Close' button is located at the bottom left of the form.

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

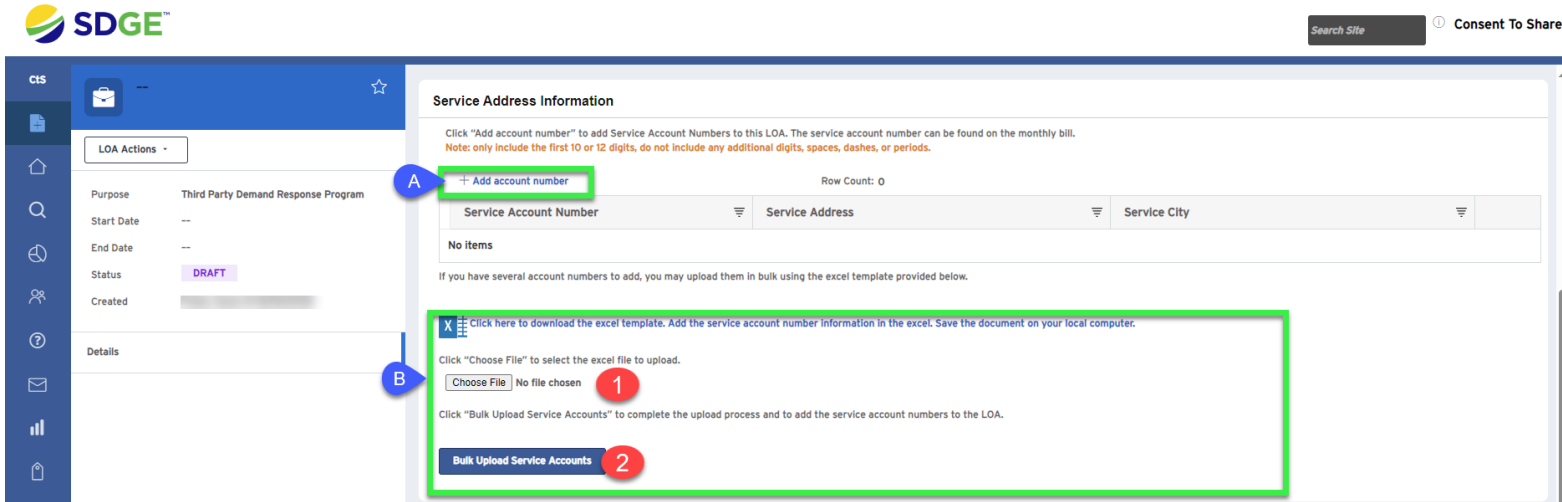


9. An online form will be displayed to fill out the necessary information for the LOA. Fields marked with "\*" are mandatory to complete.

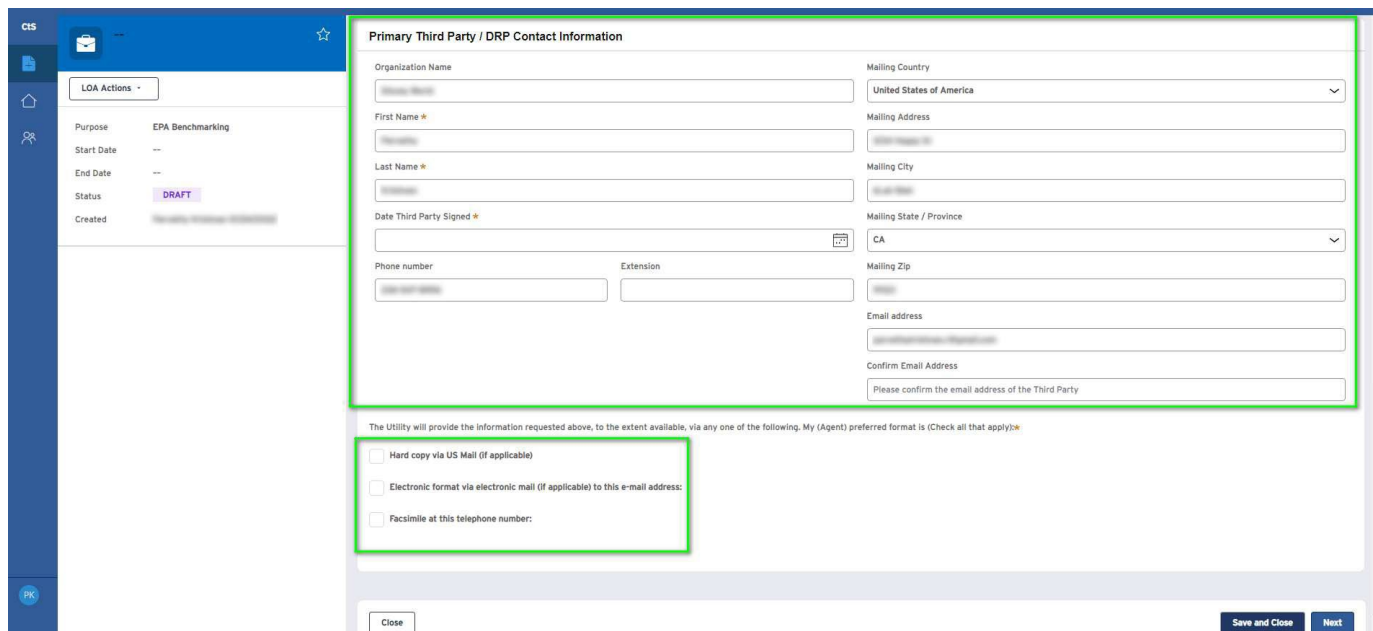
10. Enter the information in the **Customer Contact Information** section to the best of your knowledge. Make sure to provide a **valid email address**. This email will be used by SDG&E as the primary contact for all correspondence related to this LOA. The **mailing address and phone number** will be 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.

**Important:** 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.

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.



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**.



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 relevant option, initial **Option 9** and provide the authorization description. You may provide more than one authorization by initialing all the relevant boxes.

The screenshot shows a web interface for 'Customer Actions Authorized'. On the left, a sidebar contains 'LOA Actions' with details: Purpose: EPA Benchmarking, Start Date: --, End Date: --, Status: DRAFT, and Created: [redacted]. The main content area is titled 'Customer Actions Authorized' and includes a 'Close' button. Below the title, there is a warning: 'Please review and initial the required boxes. (Must initial at least one)'. A disclaimer follows: '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.' The form contains a list of nine authorization options, each with a text input box for initials. A green rectangular box highlights these input boxes. The options are:

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®)
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)

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.'

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.

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 LOA?

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 them in the box below.

The box below is for entering data requests or special instructions. Examples 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 500 characters.

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.**


Select the files you wish to upload.



**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.




**Drag and drop files here**

or

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

**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.



Drag and drop files here

or


**Select file(s)**

Name *	File	Category	Classification <span style="font-size: small;">(i) (i)</span>
<input type="text"/>	<input type="text"/>	<div style="border: 2px solid green; padding: 5px;">           LOA Form <span style="float: right;">▼</span>            Select...            LOA Form            List of Service Accounts            Identification Proof            Property/Rental/Lease Agreements            Utility Bill            Special Instructions            Revoke Document            Other         </div>	Public <span style="float: right;">▼</span> <span style="font-size: small;">(i)</span>

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.



Drag and drop files here

or

**Select file(s)**

Name *	File	Category	Classification <span style="font-size: small;">(i)</span>
<input type="text"/>	SeaWorld Parks & Entertainment, Inc..pdf	<input type="text"/>	<div style="border: 2px solid green; padding: 5px;">           Public <span style="float: right;">▼</span>            Select...            Customer Only            Internal            Public            Third Party Only         </div>

**Private** - Documents in this classification will be viable to you and SDG&E only.

**Public** - Documents in this classification will be viewable to all users with access to this LOA case.

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

The screenshot shows the SDGE web interface for a LOA (LOA-0000261008). The main content area is titled "Customer Actions Authorized" and contains a list of nine authorization options, each with a checkbox:

- 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
- EPA Benchmarking (authorizes usage information to be uploaded to the EPA's ENERGY STAR Portfolio Manager®)
- Request and receive copies of correspondence with my account(s) concerning (initial all that apply)
- Request investigation of my utility bill(s)
- Request special metering, and the right to access interval usage and other metering data on my account(s)
- Request rate analysis
- Request rate changes
- Request and receive verification of balances on my account(s) and discontinuance notices.
- Other acts and functions (please specify)

Below the list is the "Timeframe of Authorization" section, which includes fields for "Start Date" (6/6/2024) and "End Date" (6/28/2024), and a radio button selected for "No, data will be requested later." At the bottom of the form, the "Submit" button is highlighted with a green box.

On the right-hand side, a "Files & documents (1)" panel is visible, containing a document icon and the following text:

- Standard CISR\_0 (1)
- Karen Fisher •
- 6/25/24 12:22 PM •
- LOAForm • Public

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.

The screenshot shows a web application interface for managing a Letter of Authorization (LOA). At the top, a blue header bar displays the LOA ID: LOA-0000041135. A green box highlights a confirmation message: "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." Below this, the status is shown as "PENDING-SDG&E VALIDATION".



The main content area is divided into several sections:

- Customer Information:** Includes fields for Type, Full Name, Email address, Phone number, Mailing Address, Extension, and Customer Signed Date.
- Service Account Information:** Features a table with columns for Service Account Number, Service Address, and Service City, along with "Fields" and "Refresh" buttons.
- Primary Third Party/DRP Information:** Lists details such as Full Name, Organization Name, Email address, Mailing Address, Phone number, and Primary Third Party/DRP Signed Date.
- LOA Case Information:** A table providing details on LOA Type (Non Standard), Submission Process (Electronic), Purpose of LOA (EPA Benchmarking), and various dates (Start, End, Resolved, Revoked).
- Data Disclosure Information:** A table showing Frequency/Period (Multiple), Data Elements to Disclose (EPA Benchmarking), Data Disclosure Method (Email), and other relevant details.

The interface also includes a left-hand navigation menu, a top-right "Files & documents" panel, and a Windows taskbar at the bottom.

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.

SDG&E Letter of Authorization Received

 SDG&E - Do Not Reply LOA  
To [Redacted]  


 Reply

**A Notification From SDG&E Consent to Share Portal**

Request ID: LOA-0000261009

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 [sdge.com/loa](https://sdge.com/loa) and enter your LOA Request ID. If you have any questions or concerns, email us at [CIM@sdge.com](mailto: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](https://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](https://sdge.com/privacy).

**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 [Redacted]  
Retention Policy: Sempra Default Inbox Retention (60 days)  
  

 Reply

**A Notification From SDG&E Consent to Share Portal**

Request ID : LOA-0000253021

A Letter of Authorization (LOA) to share your data with [Redacted] 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](mailto: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](https://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

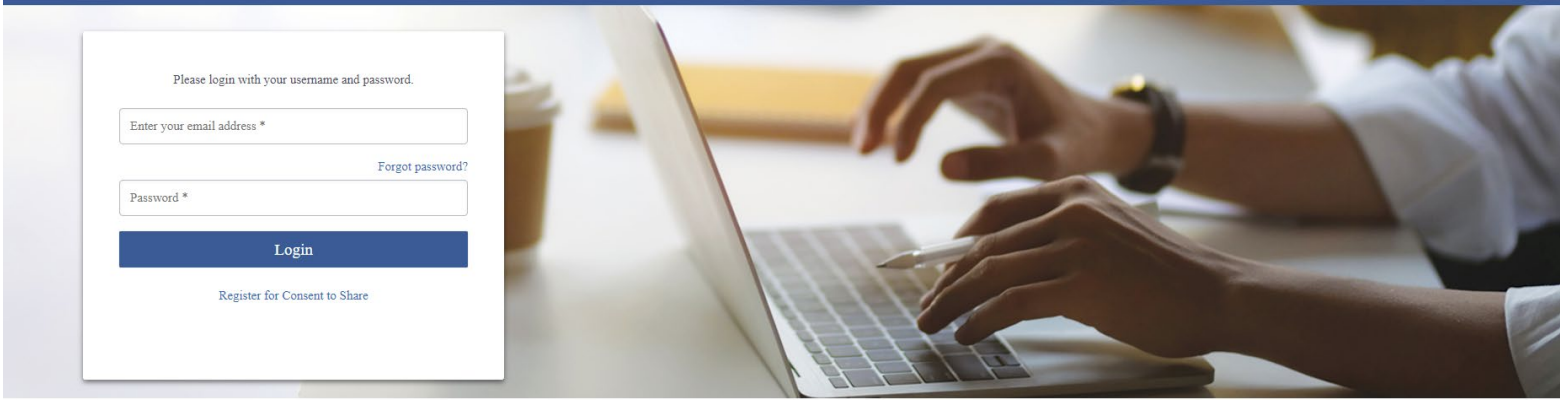
SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit [sdge.com/privacy](https://sdge.com/privacy).

## How to upload a signed LOA

1. Choose **Log in to the Portal** from the [www.sdge.com/loa](http://www.sdge.com/loa) website. Select **Third Party Login**. Use your **Consent to Share** application credentials.



Consent To Share



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

Select	LOA ID	LOA Status	LOA Type	Purpose	Submission 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
<input type="checkbox"/>	LOA-123456789	Pending Approval	Standard LOA	Site Maintenance	Standard	2023-10-26	2023-10-26	2023-10-26	John Doe	Jane Smith		
<input type="checkbox"/>	LOA-123456789	Pending Approval	Standard LOA	Site Maintenance	Standard	2023-10-26	2023-10-26	2023-10-26	John Doe	Jane Smith		
<input type="checkbox"/>	LOA-123456789	Pending Approval	Standard LOA	Site Maintenance	Standard	2023-10-26	2023-10-26	2023-10-26	John Doe	Jane Smith		
<input type="checkbox"/>	LOA-123456789	Pending Approval	Standard LOA	Site Maintenance	Standard	2023-10-26	2023-10-26	2023-10-26	John Doe	Jane Smith		
<input type="checkbox"/>	LOA-123456789	Pending Approval	Standard LOA	Site Maintenance	Standard	2023-10-26	2023-10-26	2023-10-26	John Doe	Jane Smith		
<input type="checkbox"/>	LOA-123456789	Pending Approval	Standard LOA	Site Maintenance	Standard	2023-10-26	2023-10-26	2023-10-26	John Doe	Jane Smith		
<input type="checkbox"/>	LOA-123456789	Pending Approval	Standard LOA	Site Maintenance	Standard	2023-10-26	2023-10-26	2023-10-26	John Doe	Jane Smith		
<input type="checkbox"/>	LOA-123456789	Pending Approval	Standard LOA	Site Maintenance	Standard	2023-10-26	2023-10-26	2023-10-26	John Doe	Jane Smith		
<input type="checkbox"/>	LOA-123456789	Pending Approval	Standard LOA	Site Maintenance	Standard	2023-10-26	2023-10-26	2023-10-26	John Doe	Jane Smith		

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



**Create or Upload LOA**

I am the \*

Property Manager

Select...

Building Owner

Demand Response Provider

Property Manager

Other Third Party

Customer of Record

LOA Agent

Upload a signed LOA  Start a new LOA

I want to upload a \*

Select...

Close

4. Select the purpose for your LOA.



**Create or Upload LOA**

I am the \*

Property Manager

I need authorization for the following program or reason \*

Seeking to Act on Behalf of Customer

Select...

EPA Benchmarking

Seeking to Act on Behalf of Customer

SDG&E Demand Response Program

Other Purpose

Upload a signed LOA  Start a new LOA

I want to upload a \*

Select...

Close

5. Select 'Upload a signed LOA.'



**Create or Upload LOA**

I am the \*

Property Manager

I need authorization for the following program or reason \*

Seeking to Act on Behalf of Customer

Do you want to start a new LOA or upload a signed LOA?

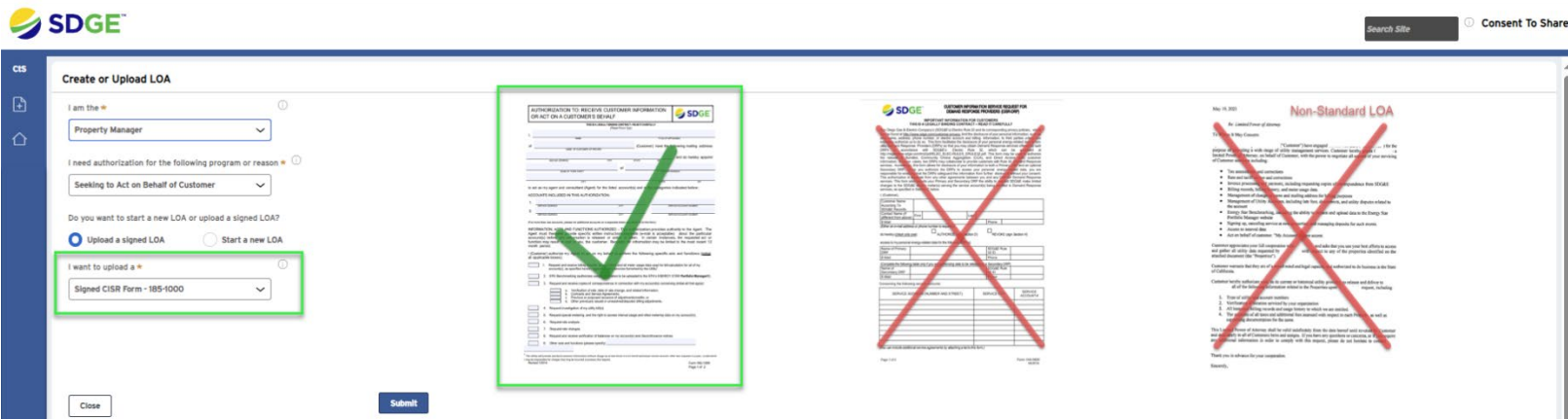
Upload a signed LOA  Start a new LOA

I want to upload a \*

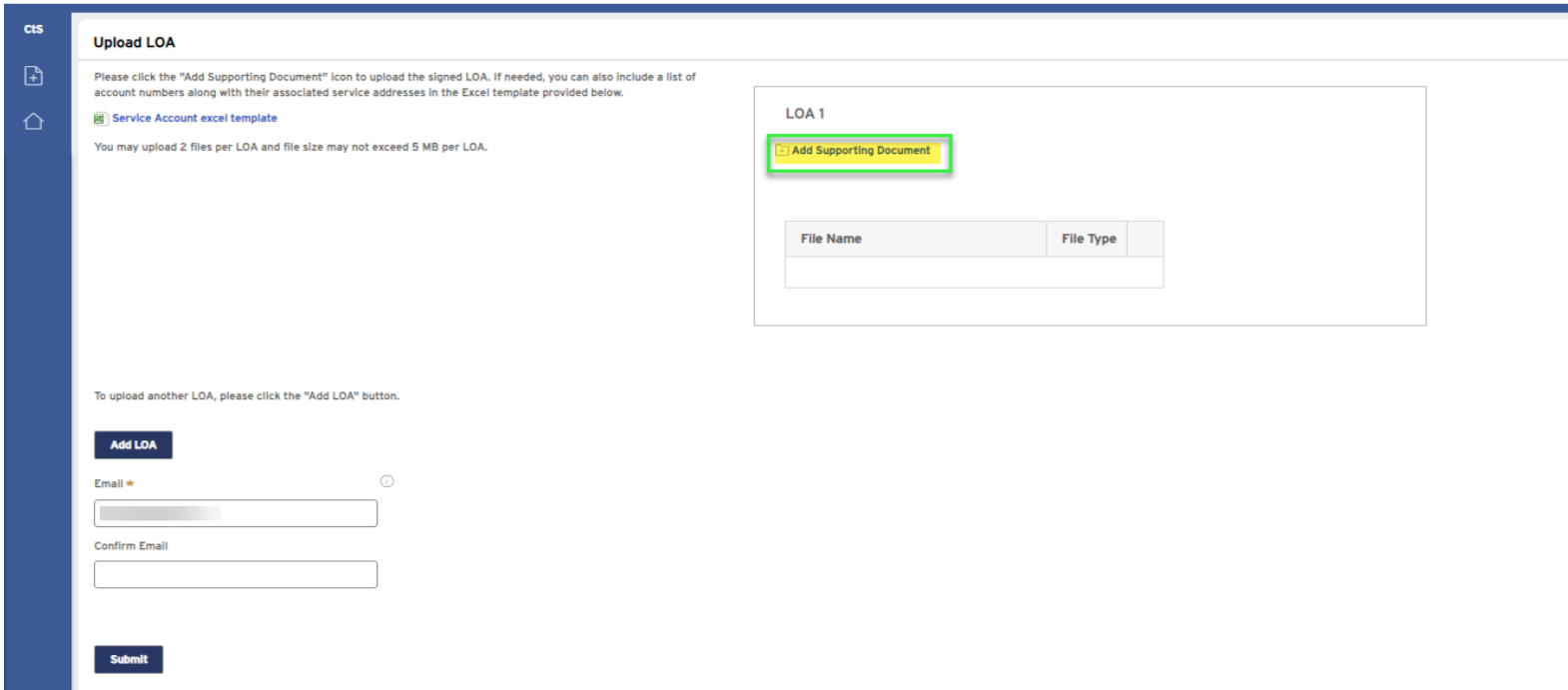
Select...

Close

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



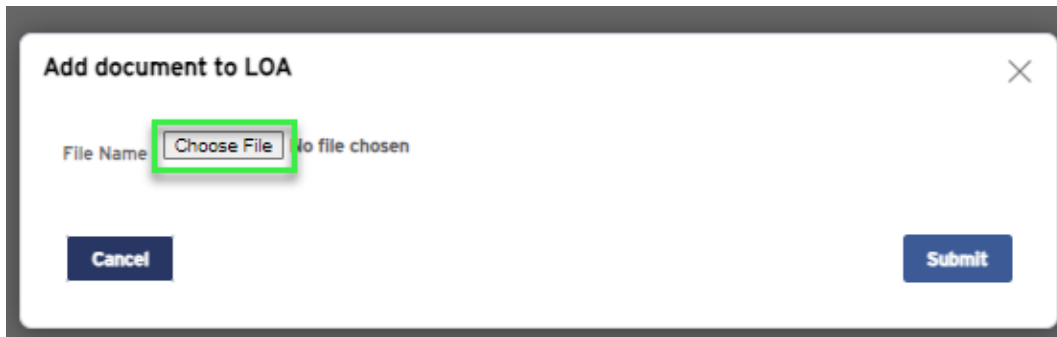
7. Click 'submit' to upload the signed PDF. Please click the "Add Supporting Document" icon to upload the signed LOA. If needed, you can also include a list of account numbers along with their associated service addresses in the **Excel template** provided below.



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.



9. After uploaded, click **'Submit.'**



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



The screenshot shows the 'Upload LOA' interface. On the left is a navigation sidebar with icons for home, search, and other functions. The main content area is titled 'Upload LOA' and contains instructions: '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.' Below this is a link for 'Service Account excel template' and a note: 'You may upload 2 files per LOA and file size may not exceed 5 MB per LOA.' A blue 'Add LOA' button is visible. Below the button are two text input fields for 'Email \*' and 'Confirm Email', followed by a 'Submit' button. On the right, a box labeled 'LOA 1' contains an 'Add Supporting Document' icon and a table with columns 'File Name' and 'File Type'. A yellow bar is shown in the 'File Name' column, and 'pdf' is in the 'File Type' column.

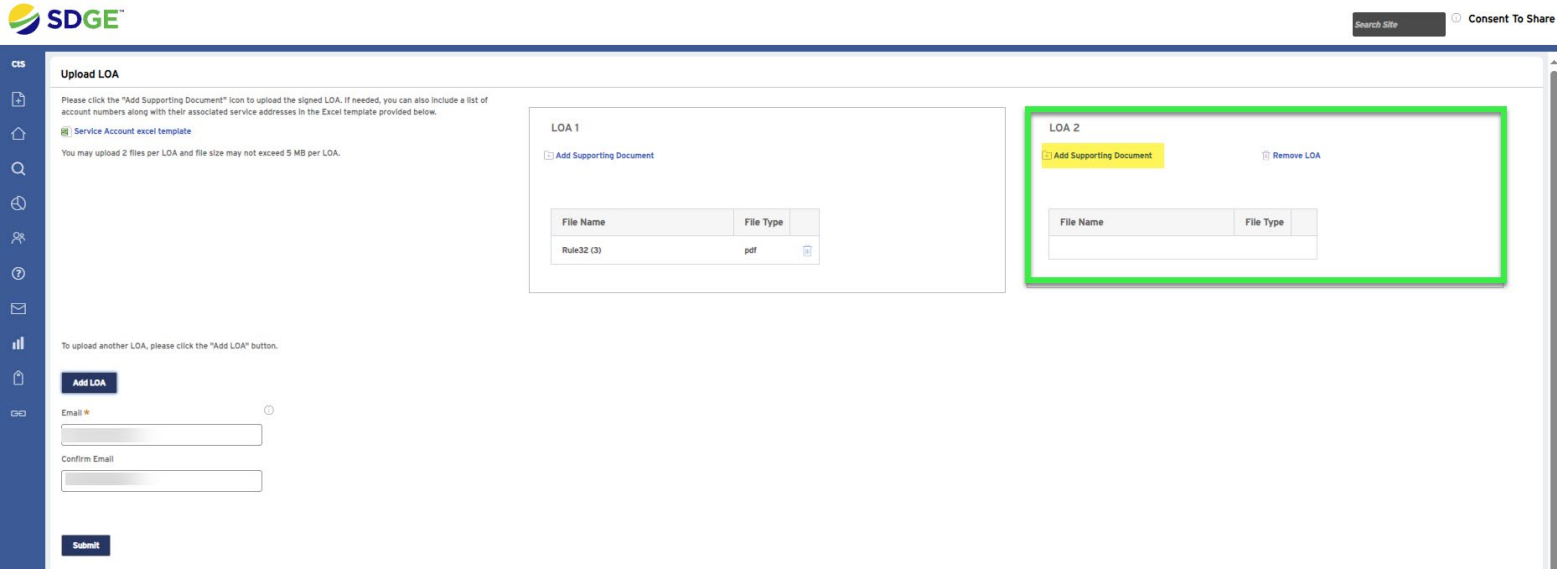
11. Repeat **steps 6 thru 9** to add any supporting documents to the LOA.

12. If you would like to upload another LOA for the same purpose but for a different third party, select '**Add LOA.**'

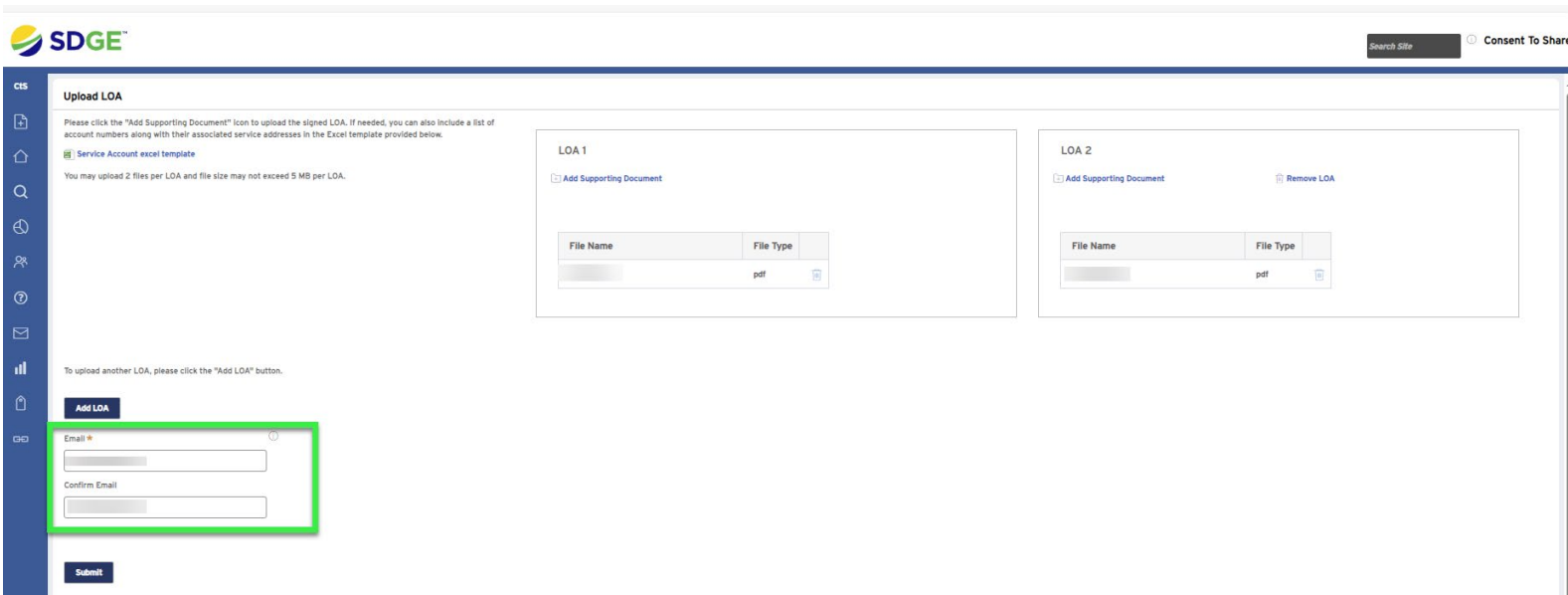


This screenshot shows the 'Upload LOA' interface with two LOA entries. The left sidebar is the same as in the previous screenshot. The main content area has the same instructions. Below the 'Add LOA' button, the 'Email \*' and 'Confirm Email' fields are visible. The 'Add LOA' button is highlighted with a green box. On the right, there are two boxes: 'LOA 1' and 'LOA 2'. 'LOA 1' contains an 'Add Supporting Document' icon and a table with 'Rule32 (3)' in the 'File Name' column and 'pdf' in the 'File Type' column. 'LOA 2' contains an 'Add Supporting Document' icon and a 'Remove LOA' link. Below the LOA boxes, the 'Add LOA' button is highlighted with a green box.

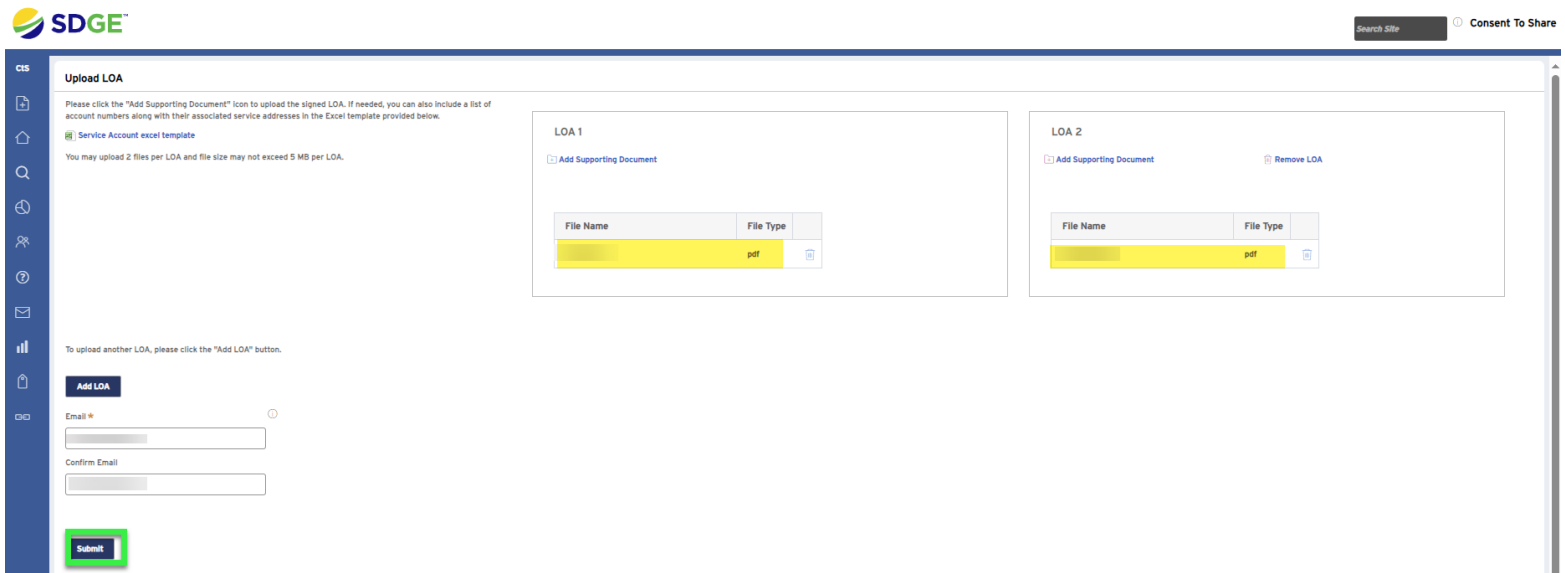
13. A new grid will be displayed to add the new LOA and supporting documents.



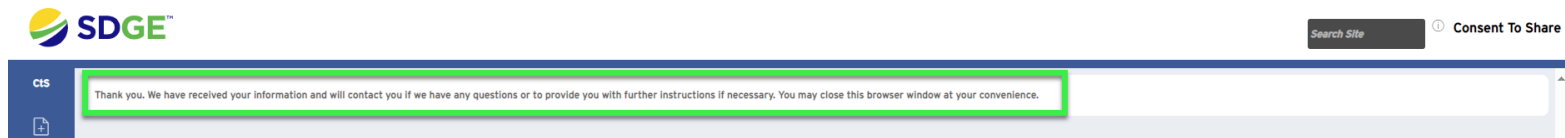
14. Enter **email** address for current user. **Note:** This email address is used solely for uploading purposes and is not associated or linked with any contact information found within the LOA.



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



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.



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

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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 ▷ Inbox x



do-not-reply-loa@sdge.com

11/14/2023 10:00 AM



#### 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 [REDACTED]. 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 [CJM@sdge.com](mailto:CJM@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 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 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 |>

LOA-000040173 
[Print Filled LOA](#)
[Print All Added Service Accounts](#)
[Reject LOA](#)

**Customer Contact Information**

Is this a Residential or Business Customer?  
 Residential  Business

First Name	Mailing Country
Last Name	Mailing Address
Email address	Mailing City
Phone number	Mailing State / Province
Extension	Mailing Zip

**Service Address Information**

Service Account Number	Service Address	Service City
------------------------	-----------------	--------------

**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, My (Agent) preferred format is (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 \*

Re-Enter Email Address \*

Facsimile at this telephone number:

Close [Save and Close](#) [Next](#)

- 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.

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

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

LOA-0000040173

Print Filled LOA | Print All Added Service Accounts | Reject LOA

Files & documents (1)

### Customer Contact Information

Type	Residential	Phone number	(619) 435-1234
Full Name	John Doe	Extension	
Email address	john.doe@sdge.com		
Mailing Address	123 Main St San Diego, CA 92101		
Customer Signed Date	10/10/2024		

### Service Address Information

Service Account Number	Service Address	Service City
123456789	123 Main St	San Diego

### Primary Third Party/DRP Contact Information

Full Name	John Doe	Organization Name	SDGE
Email address	john.doe@sdge.com	Phone number	(619) 435-1234
Mailing Address	123 Main St San Diego, CA 92101	Extension	
Primary Third Party/DRP Signed 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 at least one MUST be initiated):

- 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®)
- 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 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.
- One year authorization
- Authorization is given for the period commencing with date of execution until

### Electronic 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 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.  No, data will be requested later.

Type the characters you see in the picture below

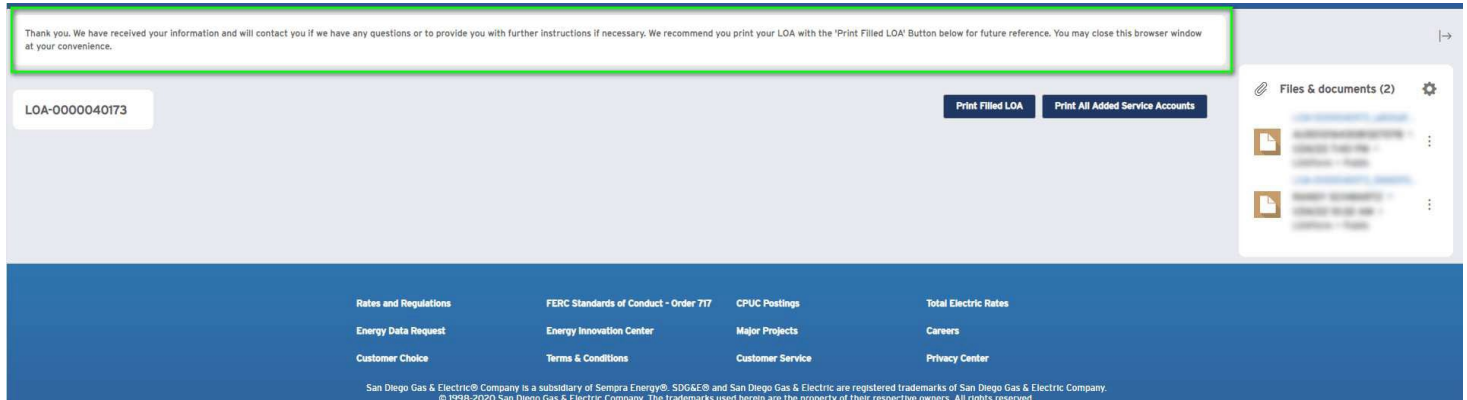


Enter CAPTCHA

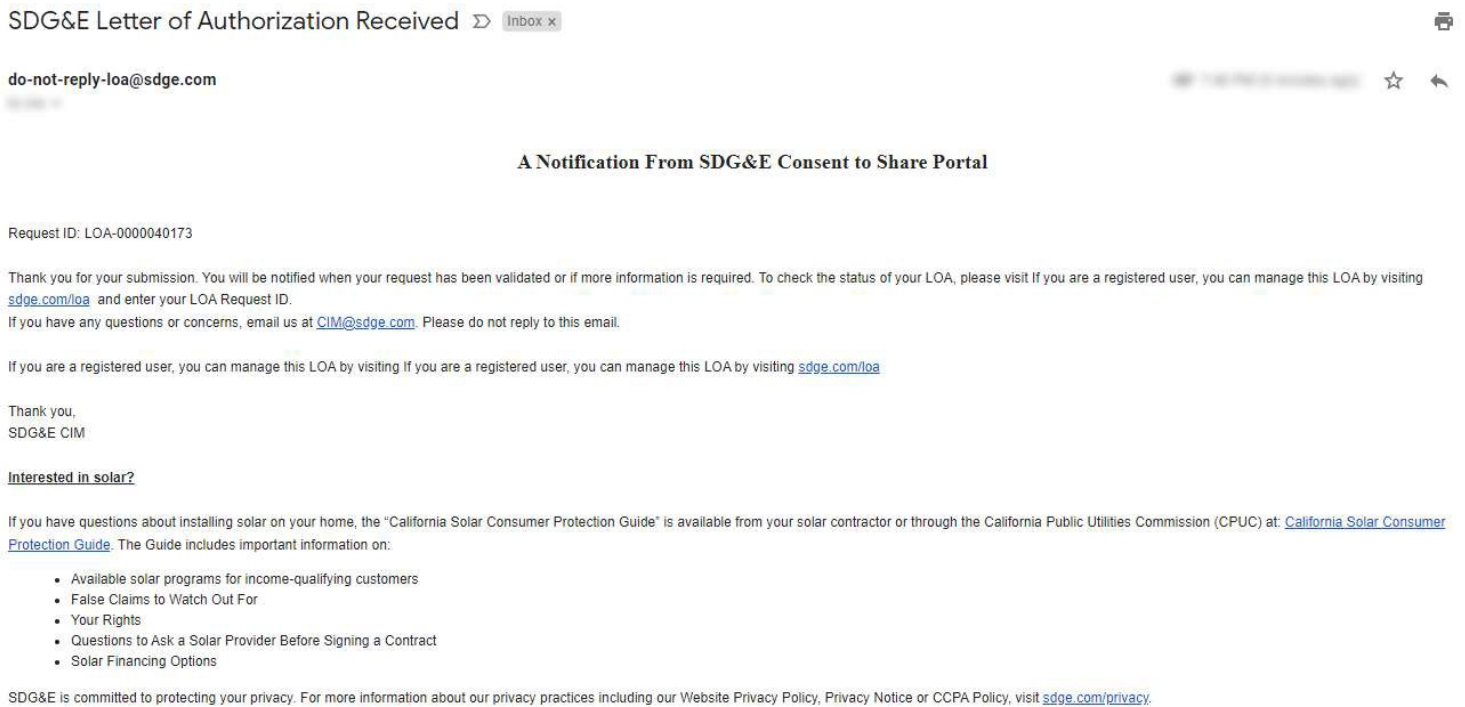
Cancel | << Back | Save and Close | Complete Review



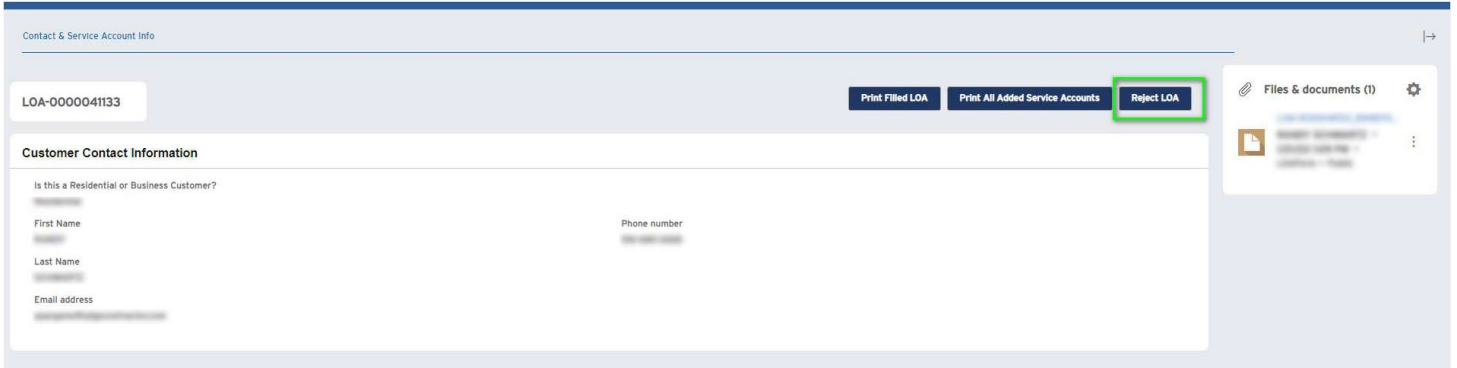
6. After you click ‘**Complete Review**,’ the LOA will be submitted to SDG&E for validation. **You have now completed the LOA signing process.**



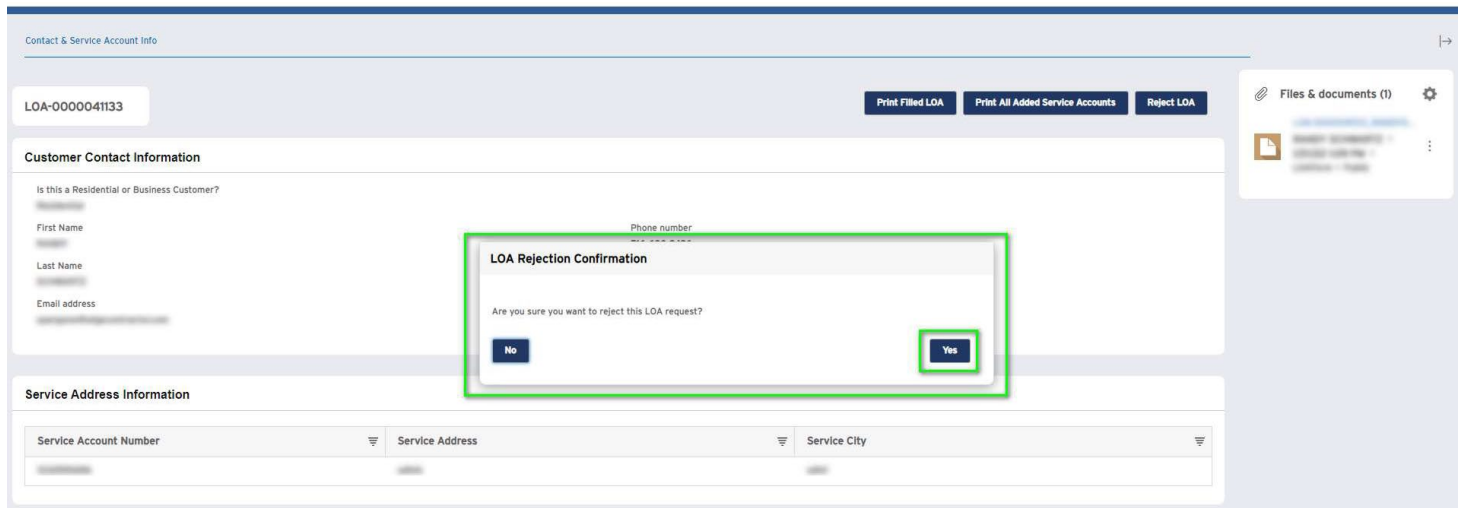
7. You will receive an email confirming the LOA. The third party will also be notified via email.



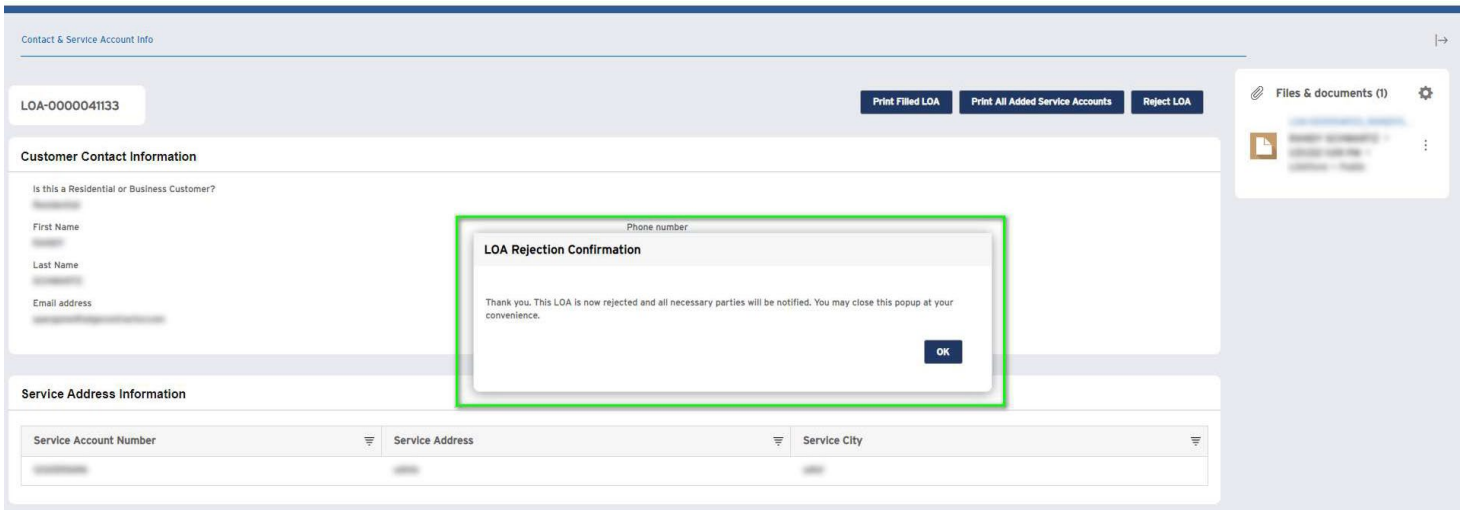
8. Any time during the above signing process, you may choose to reject the LOA by clicking '**Reject LOA**' at the top of the screen.



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



10. A confirmation message will be displayed.





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 ▾ Inbox x



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 [redacted] 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 [csr-dro@sdge.com](mailto:csr-dro@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](https://sdge.com/loa) if you are a registered user, you can manage this LOA by visiting [sdge.com/loa](https://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

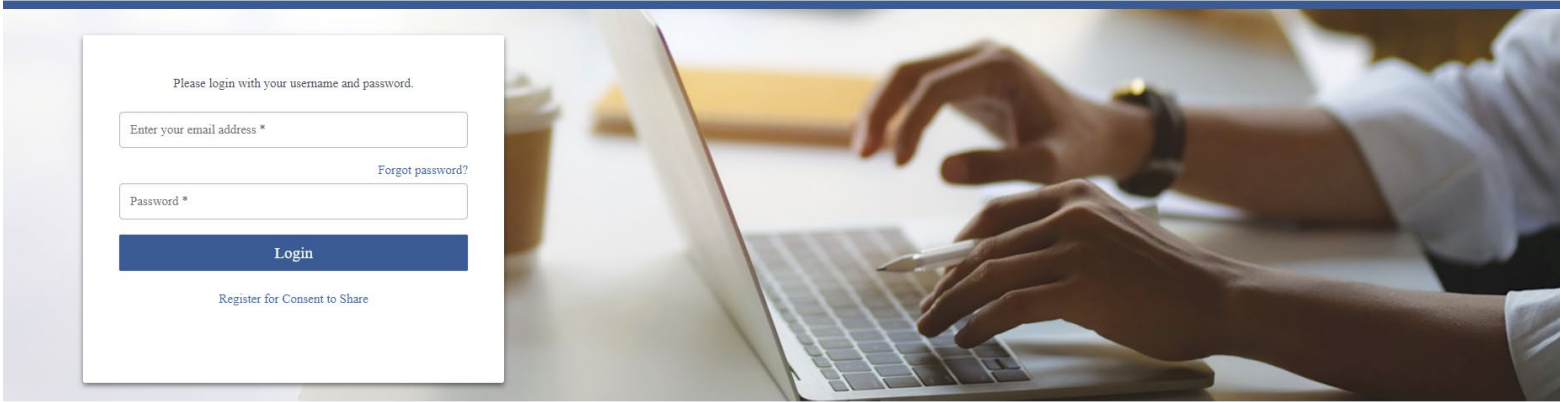
SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit [sdge.com/privacy](https://sdge.com/privacy).

Option B - Log in to CtS

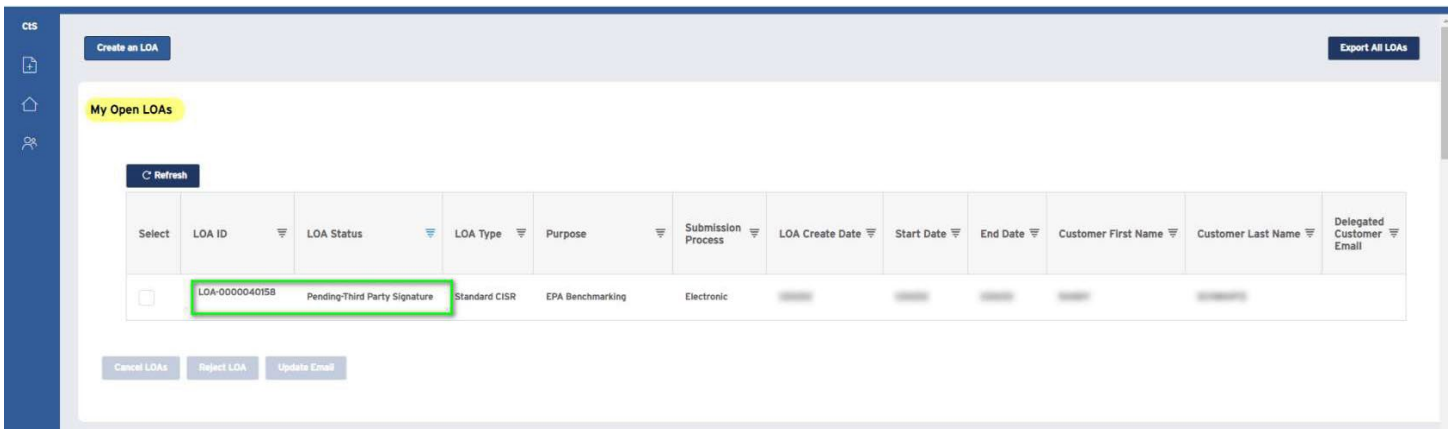
1. If you wish to sign the LOA by logging in to the application, follow these steps:
2. Log in to the **Consent to Share** application with your **My Energy Center** login credentials.



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.



#### 4. Open the LOA and review the details.

**LOA-0000040158**

LOA Actions

Purpose: EPA Benchmarking

Start Date: [Redacted]

End Date: [Redacted]

Status: **PENDING-THIRD PARTY SIGNATURE**

Created: [Redacted]

Contact & Service Account Info

Close | Print Filled LOA | Print All Added Service Accounts

Files & documents (1)

### Customer Contact Information

Is this a Residential or Business Customer?

First Name: [Redacted] Mailing Country: [Redacted]

Last Name: [Redacted] Mailing Address: [Redacted]

Email address: [Redacted] Mailing City: [Redacted]

Phone number: [Redacted] Extension: [Redacted] Mailing State / Province: [Redacted]

Mailing Zip: [Redacted]

### Service Address Information

Service Account Number	Service Address	Service City
[Redacted]	[Redacted]	[Redacted]

### Primary Third Party / DRP Contact Information

Organization Name \* [Redacted] Mailing Country \* [United States of America]

If Third Party is an individual, please enter "None" [Redacted]

First Name \* [Redacted] Mailing Address \* [Redacted]

Last Name \* [Redacted] Mailing City \* [Redacted]

Email address \* [Redacted] Mailing State / Province \* [CA]

Confirm Email Address \* [Redacted] Mailing Zip \* [Redacted]

Phone number \* [Redacted] Extension [Redacted]

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 Mail (if applicable)
- Electronic format via electronic mail (if applicable) to this e-mail address:
- Facsimile at this telephone number:

Close | Save and Close | Next

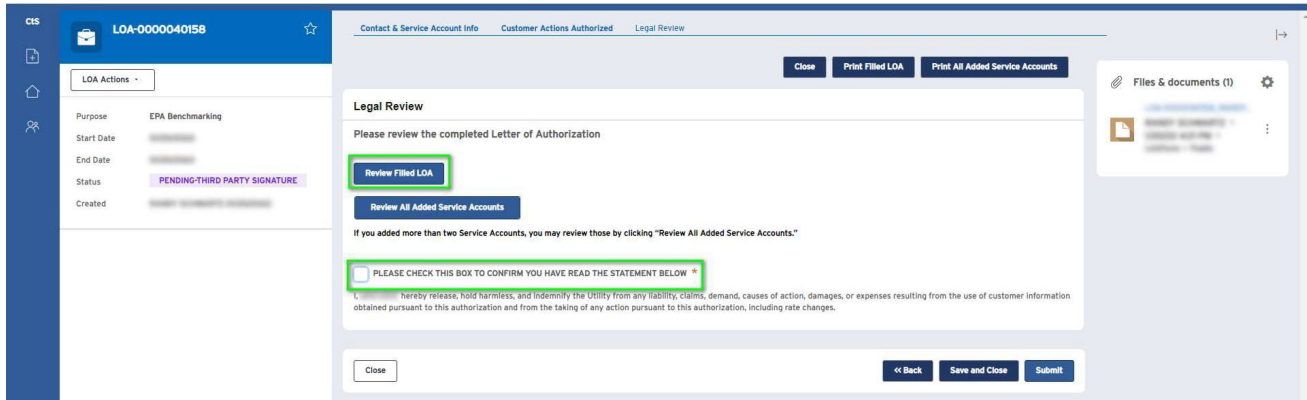
5. Click **'Next'** and review the authorizations provided by customer in the next screen.

The screenshot displays the 'Customer Actions Authorized' interface. On the left, a sidebar shows the LOA ID 'LOA-0000040158' and a 'PENDING-THIRD PARTY SIGNATURE' status. The main content area lists nine authorized actions:

- 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
- EPA Benchmarking (authorizes usage information to be uploaded to the EPA's ENERGY STAR Portfolio Manager®)
- Request and receive copies of correspondence with my account(s) concerning (initial all that apply)
- Request investigation of my utility bill(s)
- Request special metering, and the right to access interval usage and other metering data on my account(s)
- Request rate analysis
- Request rate changes
- Request and receive verification of balances on my account(s) and discontinuance notices.
- Other acts and functions (please specify)

Below the list, there is a section for authorization basis with radio button options for 'One time authorization only' and 'One year authorization'. A note states: '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.' The screen includes navigation buttons: 'Close', 'Print Filled LOA', 'Print All Added Service Accounts', 'Files & documents (1)', 'Back', 'Save and Close', and 'Next'.

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

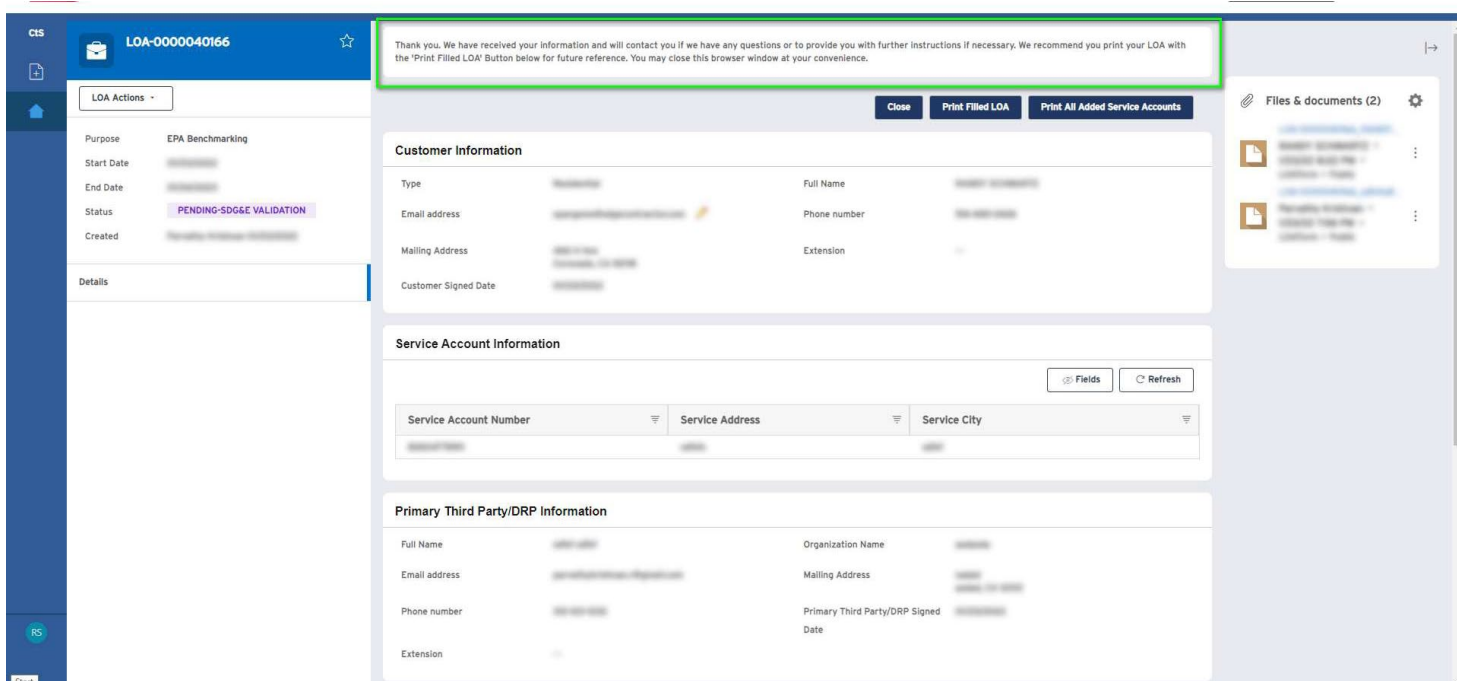


### 7. Provide your signature in the next screen.

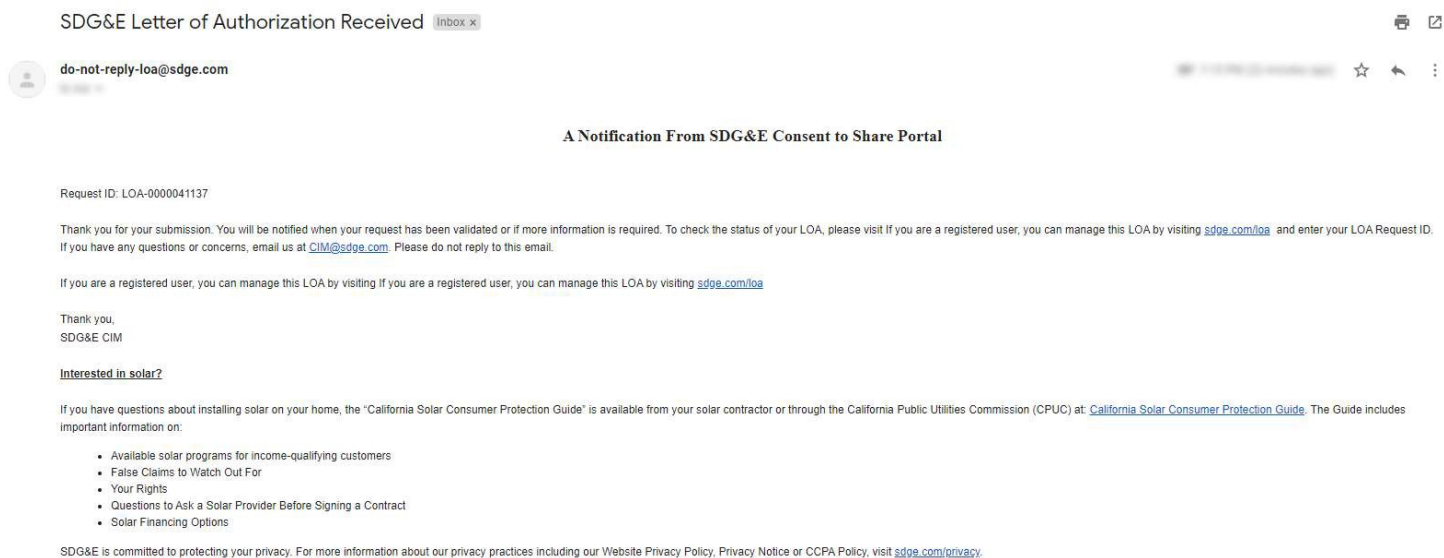
The screenshot displays the 'LOA-000040158' form in the SDGE system. The form is divided into several sections: 'Customer Contact Information', 'Service Address Information', 'Primary Third Party/DRP Contact Information', 'Customer Actions Authorized', and 'Electronic Signature'. The 'Electronic Signature' section is highlighted with a green border. It contains a text area for the signature and a checkbox for 'No, data will be requested later.' which is selected. The form also includes a sidebar with 'LOA Actions' and a top navigation bar with tabs for 'Contact & Service Account Info', 'Customer Actions Authorized', 'Legal Review', and 'Review and Sign'. The status of the LOA is 'PENDING-THIRD PARTY SIGNATURE'.



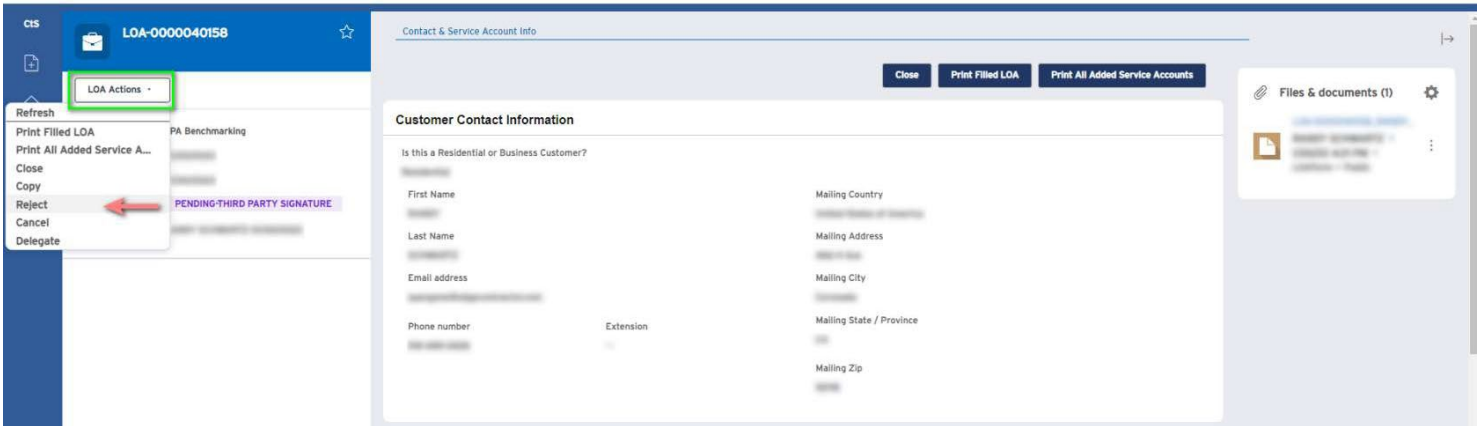
8. After you click ‘**Complete Review,**’ the LOA will be submitted to SDG&E for validation. **You have now completed the LOA signing process.**



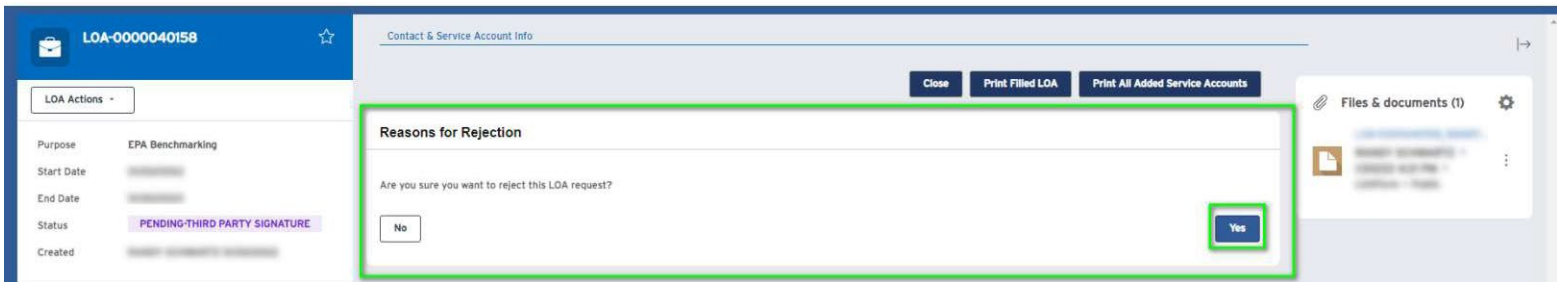
9. You will receive an email confirming the LOA. The third party will also be notified via email.



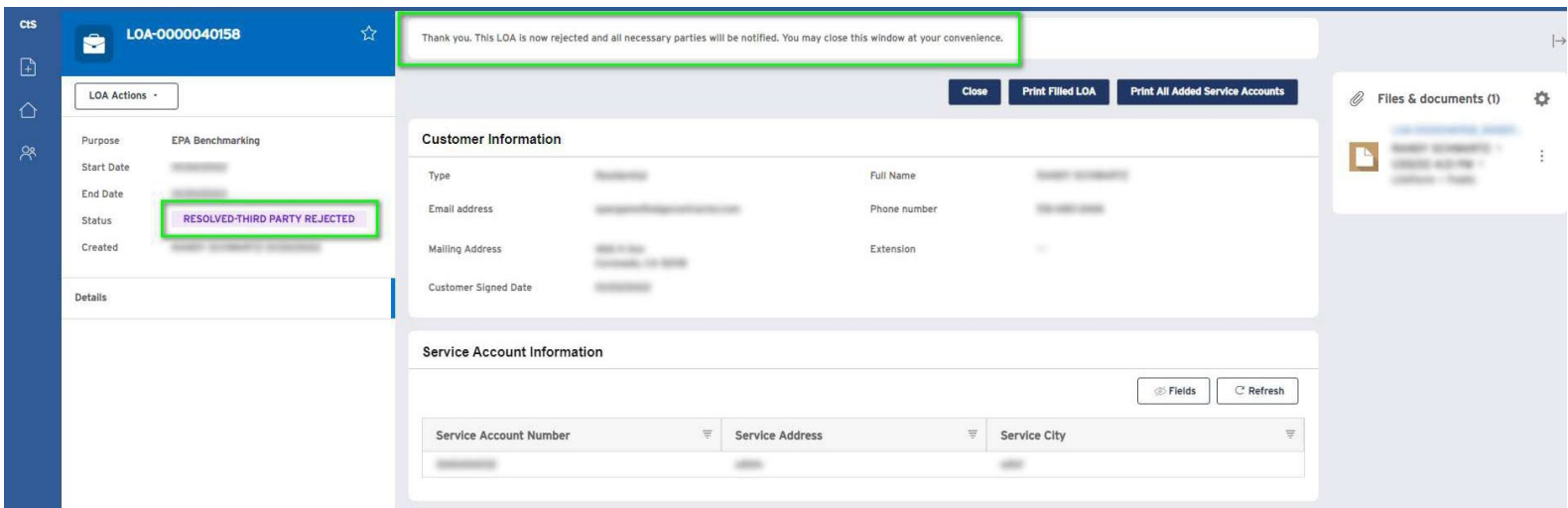
10. Any time during the above signing process, you may choose to reject the LOA by selecting **'Reject LOA'** from **LOA Actions** menu.



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



12. A confirmation message will be displayed.



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

SDG&E Letter of Authorization Rejection Received Inbox x

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 [redacted] 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 [CIM@sdge.com](mailto: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](https://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:

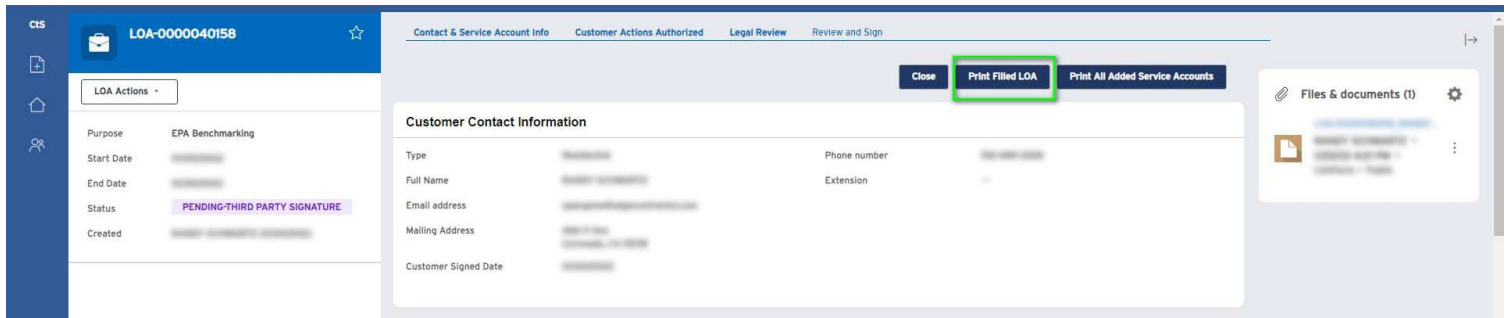
- Available solar programs for income-qualifying customers
- False Claims to Watch Out For
- Your Rights
- Questions to Ask a Solar Provider Before Signing a Contract
- Solar Financing Options

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](https://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.**'



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

**AUTHORIZATION TO: RECEIVE CUSTOMER INFORMATION OR ACT ON A CUSTOMER'S BEHALF**

**THIS IS A LEGALLY BINDING CONTRACT—READ IT CAREFULLY**  
(Please Print or Type)

I, \_\_\_\_\_ NAME \_\_\_\_\_ TITLE (IF APPLICABLE) \_\_\_\_\_  
of \_\_\_\_\_ (Customer) have the following mailing address \_\_\_\_\_  
NAME AND ADDRESS \_\_\_\_\_ CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_, and do hereby appoint  
\_\_\_\_\_ of \_\_\_\_\_  
NAME OF THIRD PARTY \_\_\_\_\_ MAILING ADDRESS \_\_\_\_\_  
CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

to act as my agent and consultant (Agent) for the listed account(s) and in the categories indicated below:

ACCOUNTS INCLUDED IN THIS AUTHORIZATION:

1. \_\_\_\_\_ SERVICE ADDRESS \_\_\_\_\_ CITY \_\_\_\_\_ SERVICE ACCOUNT NUMBER \_\_\_\_\_  
2. \_\_\_\_\_ SERVICE ADDRESS \_\_\_\_\_ CITY \_\_\_\_\_ SERVICE ACCOUNT NUMBER \_\_\_\_\_

(For more than two accounts, please list additional accounts on a separate sheet and attach it to this form.)

**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.

I (Customer) authorize my Agent to act on my behalf to perform the following specific acts and functions (initial all applicable boxes):

1. 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 Utility<sup>1</sup>.

2. EPA Benchmarking (authorizes usage information to be uploaded to the EPA's ENERGY STAR Portfolio Manager®).

3. Request and receive copies of correspondence in connection with my account(s) concerning (initial all that apply):

a. Verification of rate, date of rate change, and related information;  
 b. Contracts and Service Agreements;  
 c. Previous or proposed issuance of adjustments/credits; or  
 d. 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).

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) \_\_\_\_\_

**AUTHORIZATION TO: RECEIVE CUSTOMER INFORMATION 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<sup>2</sup> (initial one box only):

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).

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.

Authorization is given for the period commencing with the date of execution until \_\_\_\_\_ (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 specified herein.

**RELEASE OF ACCOUNT INFORMATION:**

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 Mail (if applicable).

Facsimile at this telephone number: \_\_\_\_\_

Electronic format via electronic mail (if applicable) to this e-mail address: \_\_\_\_\_

I (Customer), \_\_\_\_\_ (print name of authorized signatory), declare under penalty of 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 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 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 harmless, 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 any time by 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).]

AUTHORIZED CUSTOMER SIGNATURE \_\_\_\_\_ TELEPHONE NUMBER \_\_\_\_\_

Executed this \_\_\_\_\_ day of \_\_\_\_\_ MONTH \_\_\_\_\_ YEAR \_\_\_\_\_ at \_\_\_\_\_ CITY AND STATE WHERE EXECUTED \_\_\_\_\_

I (Agent), 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 and from the taking of any action pursuant to this authorization, including rate changes.

AGENT SIGNATURE \_\_\_\_\_ TELEPHONE NUMBER \_\_\_\_\_

COMPANY \_\_\_\_\_

Executed this \_\_\_\_\_ day of \_\_\_\_\_ MONTH \_\_\_\_\_ YEAR \_\_\_\_\_

<sup>1</sup> 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 I may be responsible for charges that may be incurred to process this request.  
Revised 1/2014

<sup>2</sup> If no time period is specified, authorization will be limited to a one-time authorization  
Revised 1/2014


3. After the LOA is completed and signed, scan the LOA to a PDF document and upload through [www.sdge.com/loa](http://www.sdge.com/loa). 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.




Start

Start a new LOA



Continue

I've already completed an LOA



Portal

Log In to the Portal

## 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 [cim@sdge.com](mailto:cim@sdge.com) and request the revocation

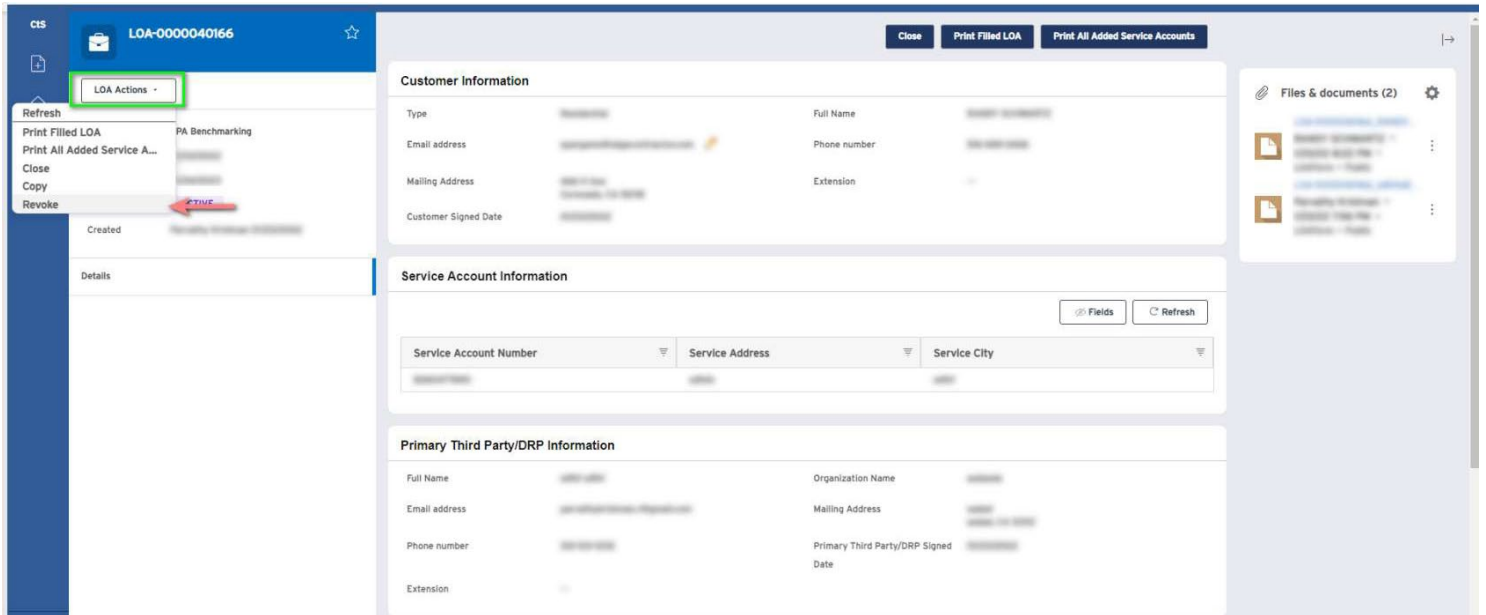
### Revoking the LOA by yourself

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

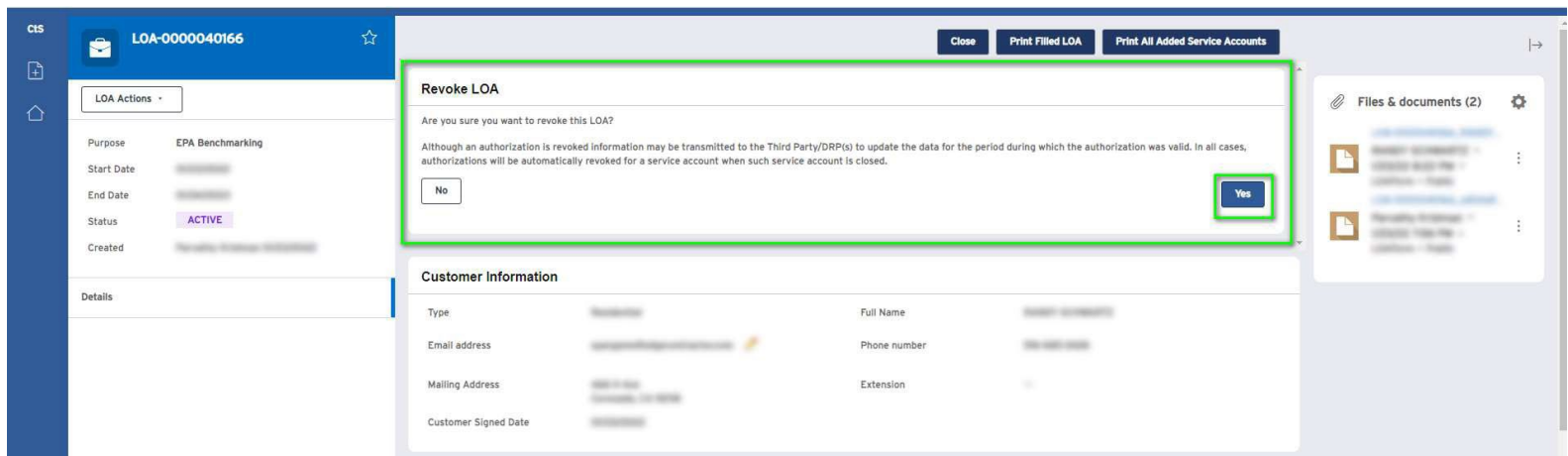
The screenshot shows the CtS interface with three sections for LOA management:

- My Open LOAs:** Contains a table with columns: Select, LOA ID, LOA Status, LOA Type, Purpose, Submission 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, and Secondary Third Party/DRP Last Name. Two rows are visible, both with a status of 'Pending'.
- My Active LOAs:** This section is highlighted with a green box. It contains a table with the same columns as above. Two rows are visible, both with a status of 'Active'. The first row (LOA-0000040166) is highlighted in yellow.
- My Closed LOAs:** This section is currently empty.

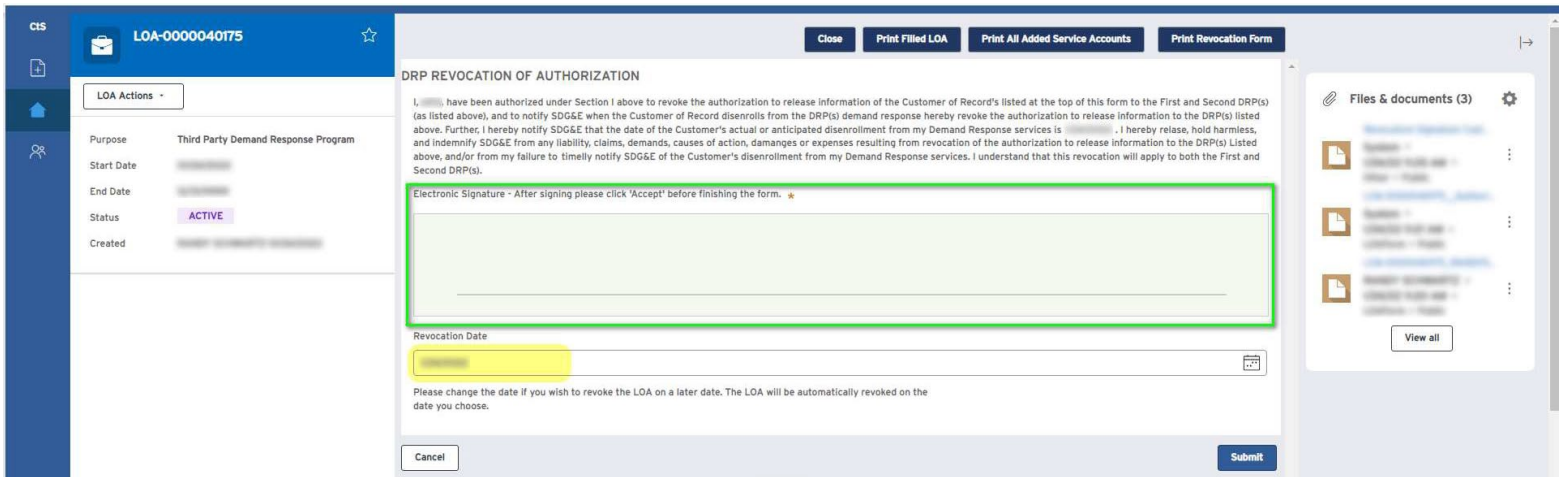
2. Click on 'LOA Actions' and choose 'Revoke.'



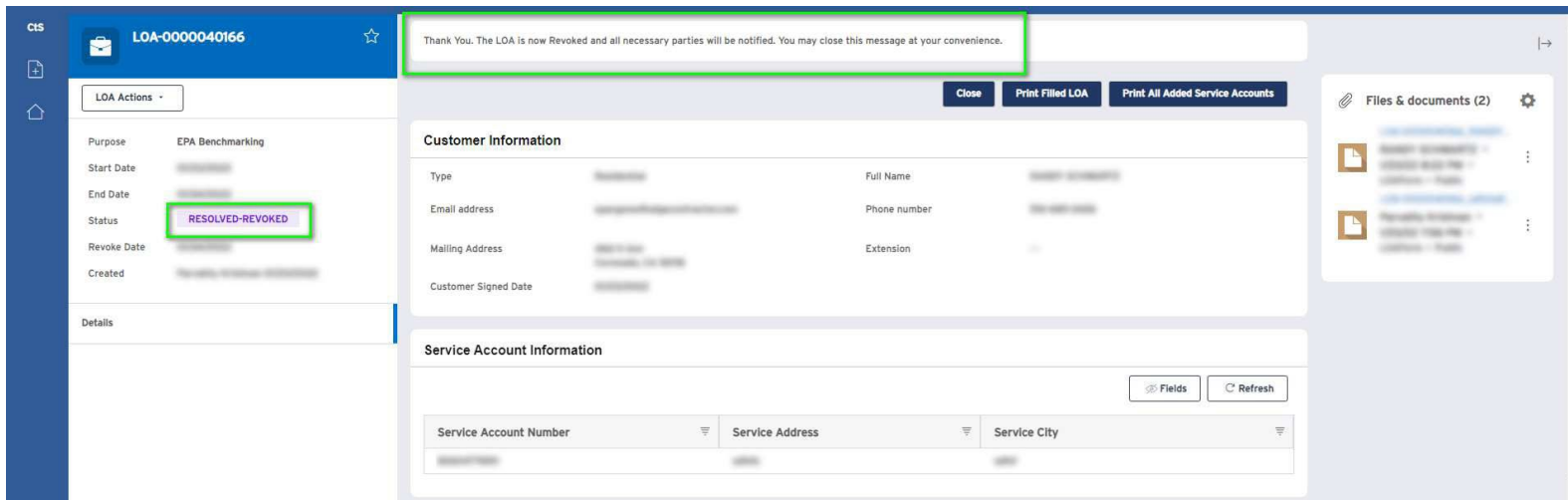
3. In the confirmation screen choose 'Yes.'



- 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.



- A confirmation message will be displayed.





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

SDG&E Letter of Authorization Revoked Inbox x



do-not-reply-loa@sdge.com



**A Notification From SDG&E Consent to Share Portal**

Request ID: LOA-0000040186

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

To submit a new request, please visit [sdge.com/loa](#). 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 [cjsr-dro@sdge.com](mailto:cjsr-dro@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

**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

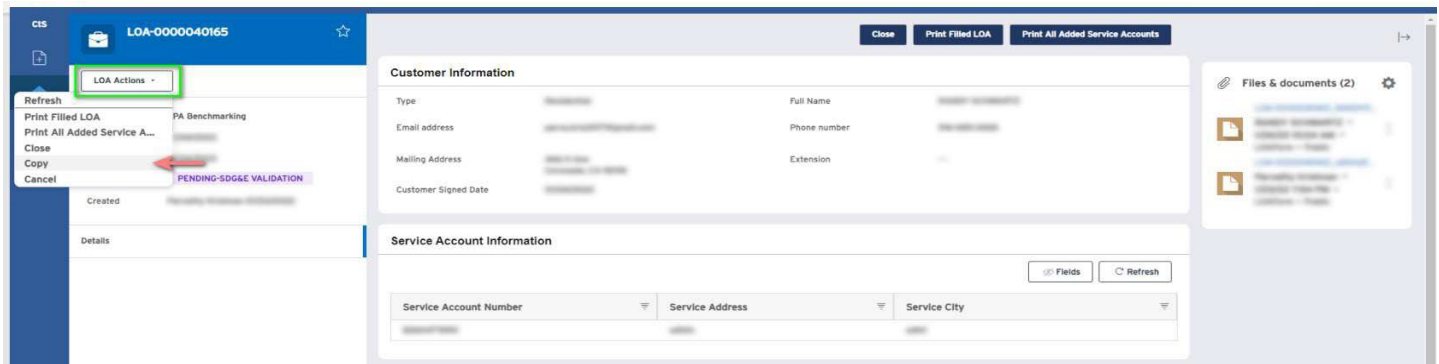
SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit [sdge.com/privacy](#).



## 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.'**



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.

CIS LOA-0000266001

LOA Actions

Purpose Seeking to Act on Behalf of Customer

Start Date --

End Date --

Status DRAFT

Created

Details

Contact & Service Account Info

Close Print Filled LOA Print All Added Service Accounts

### Customer Contact Information

Is this a Residential or Business Customer? \*

Residential  Business

First Name \* Mailing Country

Last Name \* Mailing Address

Organization Name Mailing City

Title Mailing State / Province

Email address \* Mailing Zip

Confirm Email Address \*

Phone number \* Extension

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
1			
2			
3			

If you have several account numbers to add, you may upload them in bulk using the excel template provided below.

Click 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 Lookup Customer 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  Hard copy via US Mail (if applicable)  Fax

Email address \*

Re-Enter Email Address \*

Close Save and Close Next

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

The screenshot displays the SDGE web application interface for reviewing a Letter of Authorization (LOA). The main content area is titled "Legal Review" and contains the following elements:

- Buttons: "Close", "Print Filled LOA", and "Print All Added Service Accounts".
- Section: "Legal Review" with the instruction: "Please review the completed Letter of Authorization".
- Action Buttons: "Review Filled LOA" (highlighted with a green box and a red circle with the number 1) and "Review All Added Service Accounts".
- Text: "If you added more than two Service Accounts, you may review those by clicking 'Review All Added Service Accounts.'"
- Confirmation Step: A checkbox labeled "PLEASE CHECK THIS BOX TO CONFIRM YOU HAVE READ THE STATEMENT BELOW \*" (highlighted with a green box and a red circle with the number 2).
- Disclaimer: "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 and from the taking of any action pursuant to this authorization, including rate changes."
- Buttons: "Close", "<< Back", "Save and Close", and "Submit".
- Bottom Section: "8. Request and receive verification of balances on my account(s) and discontinuance notices." and "9. Other acts and functions (please specify)".
- Footer Buttons: "Continue Offline (Paper)", "Save and Close", and "Continue Online (Electronic)".

5. Review the new LOA.

## 6. Sign the LOA.

Contact & Service Account Info
Customer Actions Authorized
Legal Review
Review and Sign

Close
Print Filled LOA
Print All Added Service Accounts

Files & documents (1)
Settings

**LOA Actions**

Purpose: EPA Benchmarking

Start Date: [Date]

End Date: [Date]

Status: PENDING-THIRD PARTY SIGNATURE

Created: [Date]

**Customer Contact Information**

Type	Phone number	[Number]
Full Name	Extension	[Number]
Email address	[Address]	
Mailing Address	[Address]	
Customer Signed Date	[Date]	

**Service Address Information**

Service Account Number	Service Address	Service City
[Number]	[Address]	[City]

**Primary Third Party/DRP Contact Information**

Full Name	Organization Name	[Name]
Email address	Phone number	[Number]
Mailing Address	Extension	[Number]
Primary Third Party/DRP Signed Date	[Date]	

**Customer Actions Authorized**

I, [Name], 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 initiated):

- 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 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 bills
- 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, [Name], 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
- 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: [Date]

Authorization is given for the period commencing with date of execution until [Date]

**Electronic Signature**

I, [Name], 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 and from the taking of any action pursuant to this authorization, including rate changes.

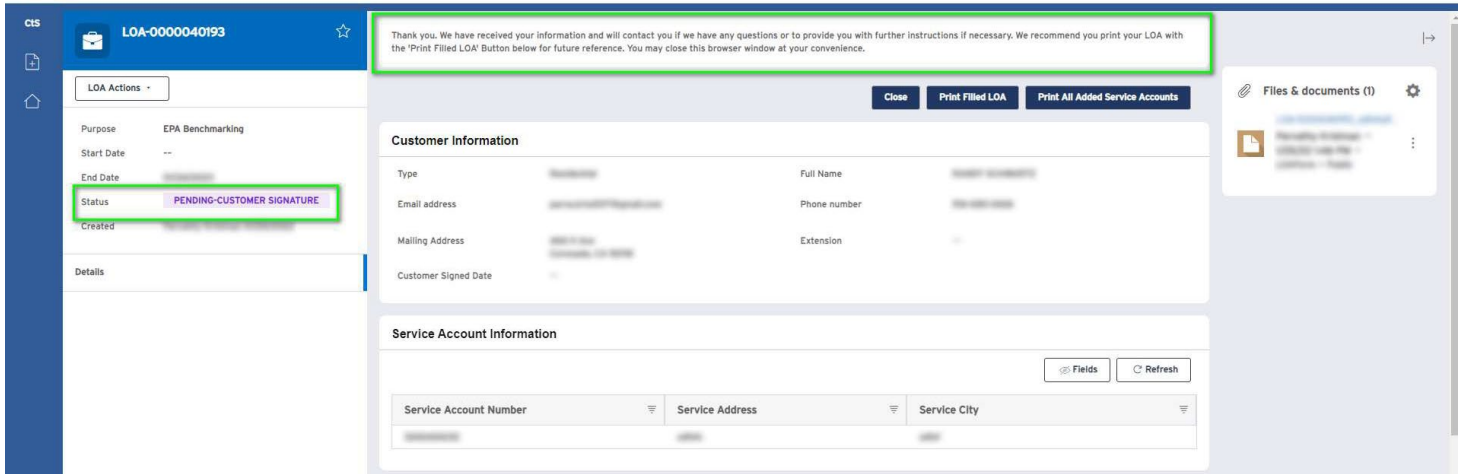
Electronic Signature - After signing please click 'Accept' before finishing the form.

Would you like to make a data request or include special instructions with this LOA?

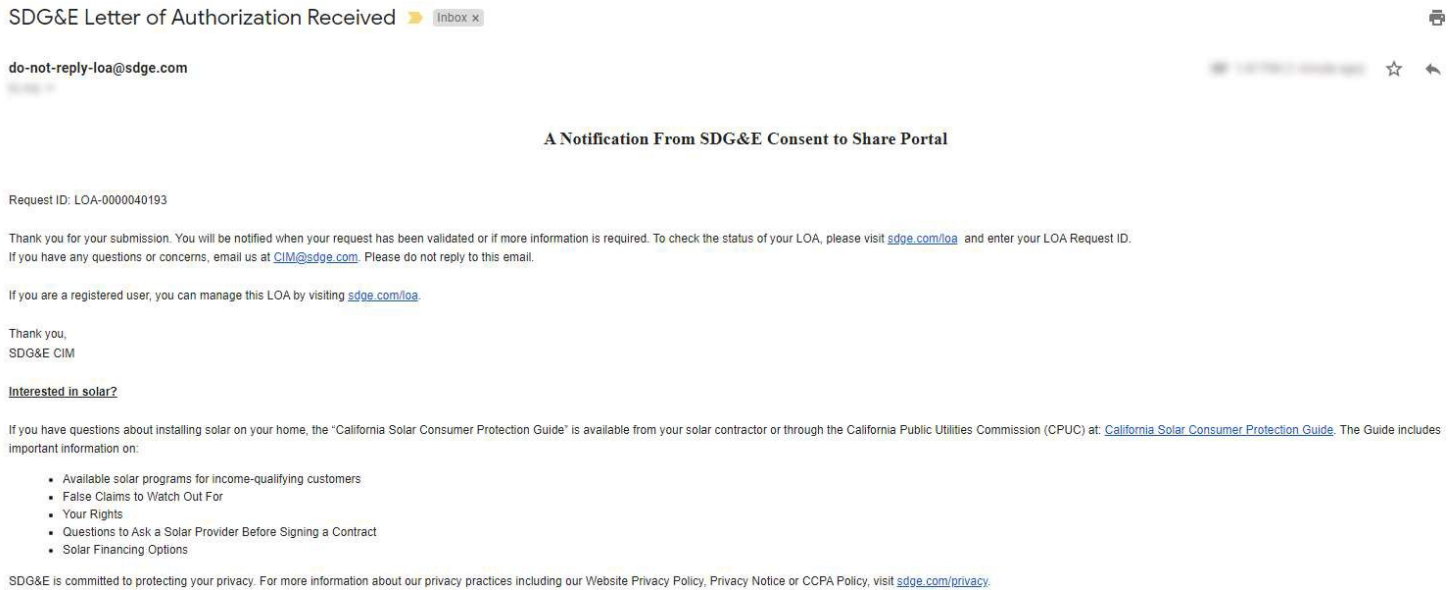
Yes, I would like to request data or provide special instructions now.  No, data will be requested later.

Cancel
Back
Save and Close
Complete Review

7. A confirmation message will be displayed.



You will receive an email confirming the LOA.



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 [cim@sdge.com](mailto:cim@sdge.com) and request the revocation

### **Cancelling the LOA by yourself**

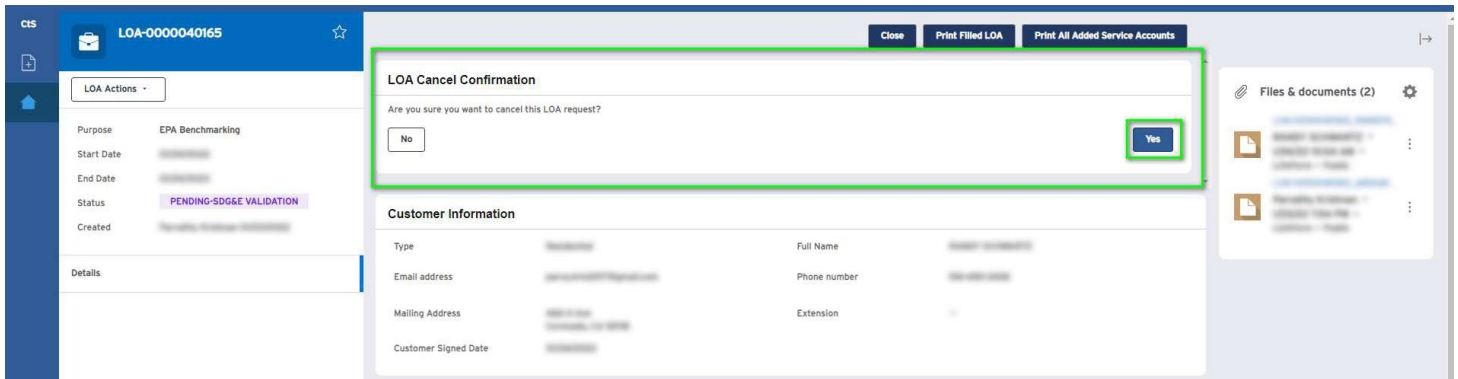
1. Log in to CtS and open the pending (yet to be active) LOA that you wish to cancel. You may find these in the 'My Open LOAs' table in the home screen.

Select	LOA ID	LOA Status	LOA Type	Purpose	Submission 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
<input type="checkbox"/>	LOA-0000040173	Pending-Third Party Signature	Standard CISR	EPA Benchmarking	Electronic							
<input type="checkbox"/>	LOA-0000040165	Pending-SDG&E Validation	Standard CISR	EPA Benchmarking	Electronic							

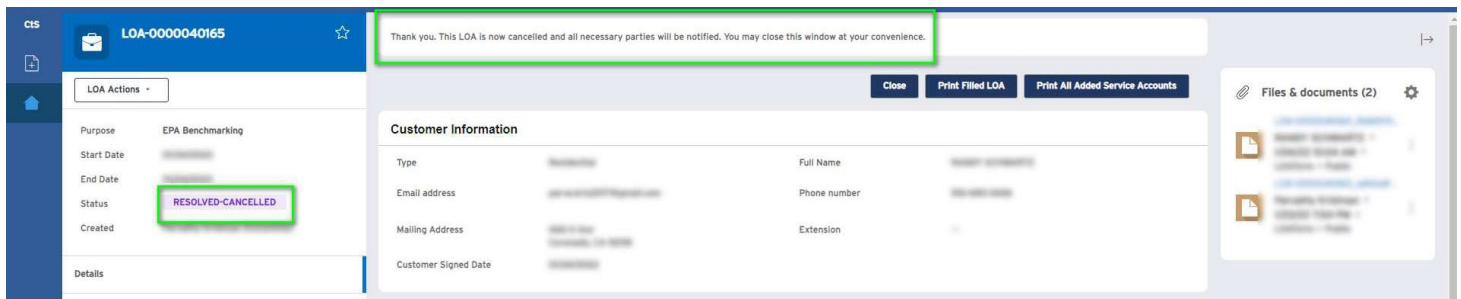
2. Go to 'LOA Actions' and click 'Cancel.'

The screenshot shows the 'LOA Actions' dropdown menu for LOA-0000040165. The 'Cancel' option is highlighted with a red arrow. The background shows the LOA details page with sections for Customer Information and Service Account Information.

3. Click 'Yes' to provide confirmation.



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



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

SDG&E Letter of Authorization Canceled Inbox x

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](https://sdge.com/loa).

If you have any questions or concerns, email us at [CIM@sdge.com](mailto: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](https://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

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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 ([www.sdge.com/loa](http://www.sdge.com/loa)) and find the email address that you wish to update.
2. Click on the **pencil icon** displayed next to the email address.

The screenshot shows the 'LOA-0000040193' page. The left sidebar contains 'LOA Actions' and 'Details'. The main content area is divided into three sections: 'Customer Information', 'Service Account Information', and 'Primary Third Party/DRP Information'. In the 'Primary Third Party/DRP Information' section, the 'Email address' field is highlighted with a green box, and a red arrow points to a pencil icon next to it, indicating the edit function.

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

This screenshot shows the same 'LOA-0000040193' page, but now the 'Email address' field in the 'Primary Third Party/DRP Information' section is active. A green box highlights the text input field, the 'Cancel' button, and the 'Save' button, indicating the user is in the process of updating the email address.



SDG&E Letter of Authorization Email Address Update Inbox x

do-not-reply-loa@sdge.com

**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
[Redacted]	[Redacted]	[Redacted]

If you have any questions or concerns, email us at [CIM@sdge.com](mailto: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](http://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:

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- Solar Financing Options

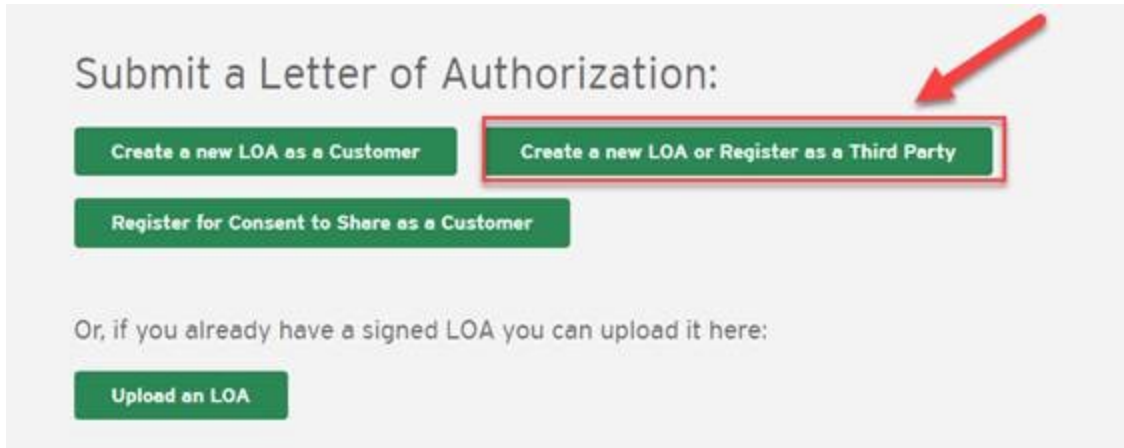
SDG&E is committed to protecting your privacy. For more information about our privacy practices including our Website Privacy Policy, Privacy Notice or CCPA Policy, visit [sdge.com/privacy](http://sdge.com/privacy).

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:

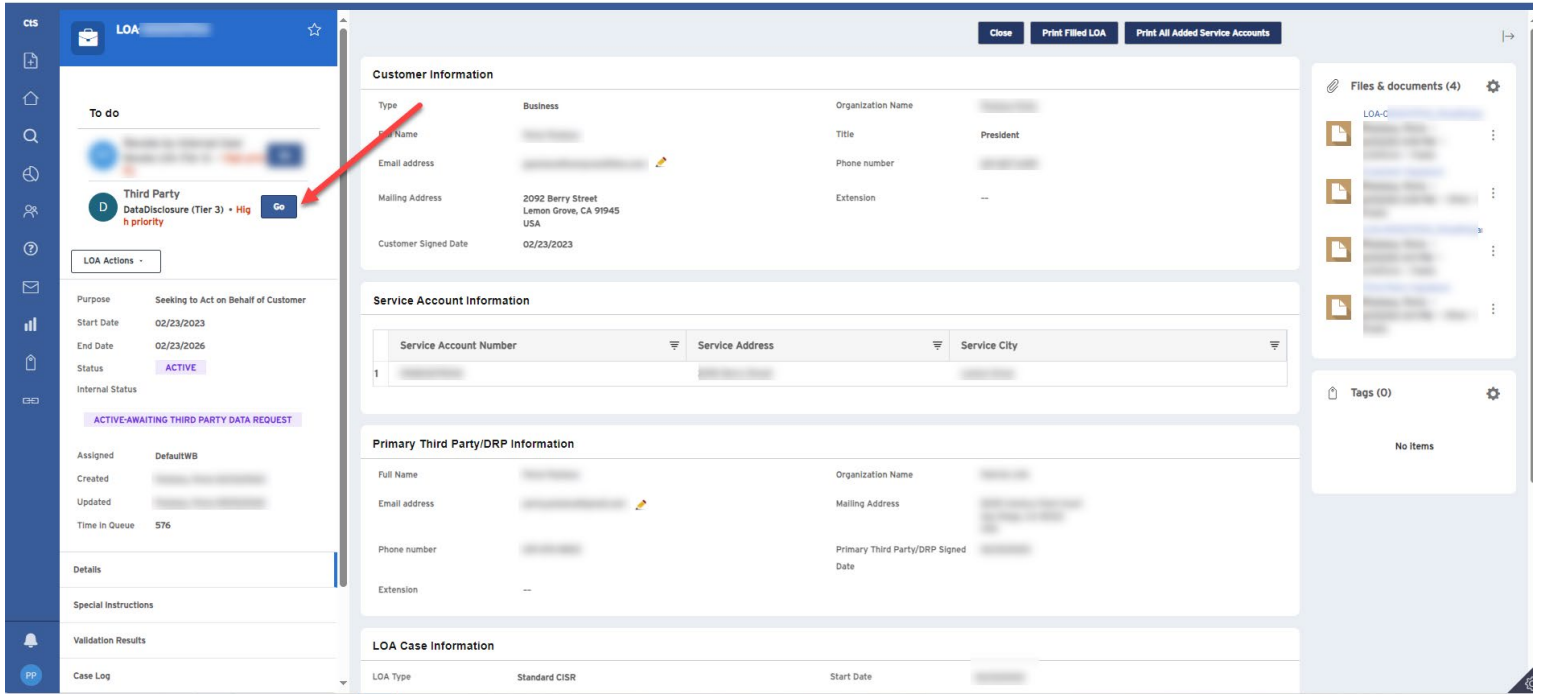
1. **Access** Consent to Share (CtS) profile:
  - a. Visit [www.sdge.com/loa](http://www.sdge.com/loa).
  - b. Select **“Create a new LOA or Register as Third Party”**.



- 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.

Select	LOA ID	External Status	Internal Status	LOA Type	Purpose of LOA	Submission Process	Start Date	End Date	Customer name	Customer Organization Name	Primary Third Party/DRP Name	Primary Organization Name	Secondary Third Party/DRP Name	Secondary Organization Name
<input type="checkbox"/>	[Redacted]	Active	Active	Standard CISR	Seeking to Act on Behalf of Customer	Electronic	2/23/23	2/23/26	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	[Redacted]	Active	Active	[Redacted]	Third Party Demand Response Program	Electronic	10/27/22	12/31/99	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

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



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.

This LOA has the following information authorized for sharing. Please indicate the data that you need disclosed, and our LOA agents will process your request and send your data to you or provide access as needed.

**Authorized Data**

2. EPA Benchmarking

Special Instructions to LOA Agent

Insert any specific instruction here.

Cancel Save and Close Submit

**Customer Information**

Type	Organization Name
Full Name	Title
Email address	Phone number
Mailing Address	Extension
Customer Signed Date	

**Service Account Information**

Service Account Number	Service Address	Service City
------------------------	-----------------	--------------

## 7. Data Delivery via Electronic Data Transfer (EDT):

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

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## Questions?

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If you have any questions or concerns, email us at [CIM@sdge.com](mailto:CIM@sdge.com) or visit us at [sdge.com/loa](https://sdge.com/loa).