

# CUSTOMER INFORMATION SERVICE REQUEST FOR SHARE MY DATA (CISR-SMD)

**IMPORTANT INFORMATION FOR CUSTOMERS – BE SURE TO READ FIRST  
THIS IS A LEGALLY BINDING CONTRACT – READ IT CAREFULLY**

This form allows you to create a new Authorization to grant a Third Party access to your PG&E data via PG&E's Share My Data (SMD) platform or to modify or revoke an existing Authorization you currently have on the Share My Data platform. This form should be completed by the main Customer Account Holder (name on the PG&E bill) or the Customer's Authorized Agent.

Pacific Gas and Electric Company's (PG&E's) Gas and Electric Rules 27 and its corresponding privacy policies, which can be found at [www.pge.com/about/company/privacy/customer](http://www.pge.com/about/company/privacy/customer), do not allow for the disclosure of customers' personal information, such as your name, address, phone number, or electric account and billing information, to third parties for purposes other than providing utility services to you or as otherwise required by law, unless you expressly authorize us to do so. This form allows you to exercise your right to disclose personal energy-related information about you to a Third Party under PG&E's Electric Rule 25 which can be found at [www.pge.com/tariffs/tm2/pdf/ELEC\\_RULES\\_25.pdf](http://www.pge.com/tariffs/tm2/pdf/ELEC_RULES_25.pdf). This form may be used to authorize the release of electric-related information for Bundled, Community Choice Aggregation (CCA), Direct Access (DA) customers, and gas-related information for Core End-Use and Noncore End-Use customers. When you authorize access by a Third Party to personal energy-related information about you, you agree that you are solely responsible for ensuring that the Third Party safeguards this information from further disclosure without your consent.

If you want to provide data to a Demand Response Provider (DRP), please use "Customer Information Service Request For Demand Response Provider" (CISR-DRP), Form 79-1152.

This agreement at all times shall be subject to such modifications as the California Public Utilities Commission may direct from time to time in the exercise of its jurisdiction, including, without limitation, revisions to the types of customer information to be released.

## STEP 1: AUTHORIZATION DETAILS

- **Please select the action you wish to take:**

- CREATE A NEW AUTHORIZATION** – Please Complete [SECTION 1](#)
- MODIFY AN EXISTING AUTHORIZATION** – Please Complete [SECTION 2](#)
- REVOKE AN EXISTING AUTHORIZATION** – Please Complete [SECTION 3](#)

- **Your Contact Information:**

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

- **Please provide either an email address or your My Account User Name:**

Email Address: \_\_\_\_\_  
*(The email address you provide here will be used for all transactional emails relating to this Authorization.)*

**OR**

My Account User Name: \_\_\_\_\_  
*(If you provide your My Account User Name you will have the ability to modify or revoke this Authorization via My Account, your PG&E online account. All transactional emails relating to this Authorization will be sent to the email address associated to your My Account account.)*

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## [SECTION 1: CREATE A NEW AUTHORIZATION]

- **Third Party:**

Please provide the name of the Third Party you authorize to access your data via the Share My Data platform. You may authorize only those third parties who have registered with PG&E to use the Share My Data platform. This form will not be processed if you list a Third Party who has not registered to use the Share My Data platform.

Name of Third Party: Energy Solutions

*(PLEASE NOTE: PG&E has not conducted vendor security reviews on the Share My Data registered Third Parties. Please be sure to read Terms and Conditions offered by the Third Party prior to authorizing the Third Party to access your data.)*

- **Data Elements:**

Please select the data elements you wish to authorize (you may select more than one data element):

- [ ] **Basic Information** (Includes name and service address)
- [ ] **Billing Information** (Includes up to 48 months historical, current, and ongoing billing records, billing and meter read dates, rate schedule, and voltage class.)
- [ ] **Account Information** (Includes account number(s), service agreement number(s), and service start date.)
- [ ] **Usage Information** (Includes up to 48 months of historical, current, and ongoing electric and/or gas usage data used for bill calculations, interval usage, and interval time-of-use indicators.)
- [ ] **Program Enrollment Information** (Includes current and ongoing PG&E Demand Response program name and status.)

- **Authorization Period:**

The Third Party will automatically have access to up to 48 months of historical data from the date the Authorization is created.

Please select the period of time you wish to authorize the Third Party, listed above, to have ongoing access to the data elements selected above:

[ ] Ongoing Access Until \_\_\_\_\_ or until I revoke this Authorization.  
[Date]

OR

[ ] Indefinitely until I revoke this Authorization.

In all cases, the Authorization for a Service Agreement will be automatically revoked when the Service Agreement is closed by the Customer.

- **Service Agreement IDs to be Authorized:**

Please list the Account Number(s) and Service Agreement ID(s) you, as the Customer Account Holder, are authorizing the specified Third Party to access via the Share My Data platform:

Account Number	Service Agreement ID

*(For more than three Service Agreement IDs please attach a separate file)*

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## [SECTION 2: MODIFY AN EXISTING AUTHORIZATION]

- Subscription ID:**

Please provide the Subscription ID associated to the Authorization you wish to modify. Your Subscription ID can be found in the confirmation email sent to you when the Authorization was initially created. If you cannot find your Subscription ID, please contact PG&E Customer Service at (800) 743-5000 for assistance.

Subscription ID: \_\_\_\_\_

- Authorization Period:**

Ongoing Access Until \_\_\_\_\_ or until I revoke this Authorization.  
[Date]

OR

Indefinitely until I revoke this Authorization.

In all cases, the Authorization for a Service Agreement will be automatically revoked when the Service Agreement is closed by the Customer.

- Service Agreement IDs to be added and/or removed from Authorization by the Customer Account Holder**

If you would like to add or remove Service Agreement IDs from this Authorization, please specify them below.

Account Number	Service Agreement ID	Add	Remove
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>

*(For more than three Service Agreement IDs please attach a separate file)*

## [SECTION 3: REVOKE AN EXISTING AUTHORIZATION]

- Subscription ID:**

Please provide the Subscription ID associated to the Authorization you wish to revoke. Your Subscription ID can be found in the confirmation email sent to you when the Authorization was initially created. If you cannot find your Subscription ID, please contact PG&E Customer Service at (800) 743-5000 for assistance.

Subscription ID: \_\_\_\_\_

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## STEP 2: AGREE TO SHARE MY DATA TERMS AND CONDITIONS

**Important information: Please read carefully. This is a legally binding agreement.**

- **Customer Authorization to Release Information:**

I, (First and Last Name of Customer or Agent), \_\_\_\_\_, authorize the designated Third Party to access the Customer of Record's personal energy data in accordance with these terms and conditions for the designated Service Agreement(s) as indicated in Section 1 or Section 2 above. I further understand that the Customer of Record's information may be transmitted to the Third Party even after this Authorization has ended, limited to updates to the data for the time period during which this Authorization was valid. I understand PG&E reserves the right to verify any authorization request submitted before releasing information on my behalf.

I declare that I am authorized to execute this Authorization manually or electronically on behalf of the Customer of Record, and that I have authority to bind the Customer of Record. I hereby release, hold harmless, and indemnify PG&E from any liability, claims, demands, and causes of action, damages, or expenses resulting from: (1) any release of information to the Third Party pursuant to this Authorization; (2) the unauthorized use of this information by the Third Party or any other third party; and (3) any actions taken by the Third Party pursuant to this Authorization. I understand that I may revoke this Authorization at any time by submitting a newly completed copy of this form with the Revocation check box selected. I hereby indicate my consent to execute and submit this Authorization electronically.



\_\_\_\_\_  
Signature of Customer or Agent

\_\_\_\_\_  
Date

- **Customer Authorization for Revocation**

I, (First and Last Name of Customer or Agent), \_\_\_\_\_, revoke the Authorization of the designated Third Party to access personal data about me from the designated Service Agreement(s).

I declare that I am authorized to execute this Revocation manually or electronically on behalf of the Customer of Record, and that I have authority to bind the Customer of Record. I hereby release, hold harmless, and indemnify PG&E from any liability, claims, demands, causes of action, damages, or expenses resulting from: (1) any negligent conduct relating to this Revocation; (2) any refusal to release information to the Third Party pursuant to this Revocation; and (3) any conduct by the Third Party in connection with this Revocation. I hereby indicate my consent to execute and submit this Revocation electronically.

\_\_\_\_\_  
Signature of Customer or Agent

\_\_\_\_\_  
Date

## STEP 3: SUBMIT FORM VIA EMAIL OR MAIL

Forms can be emailed to:  
[sharemydata@pge.com](mailto:sharemydata@pge.com)

Forms can be mailed to:  
Pacific Gas and Electric Company  
Share My Data  
245 Market Street, N3E  
San Francisco, CA 94105

**For the PG&E ADR Program, email completed forms to:**  
Emily Kehmeier  
[ekehmeier@energy-solution.com](mailto:ekehmeier@energy-solution.com)