

# Consent to Share User Manual

USER GUIDE FOR CUSTOMERS

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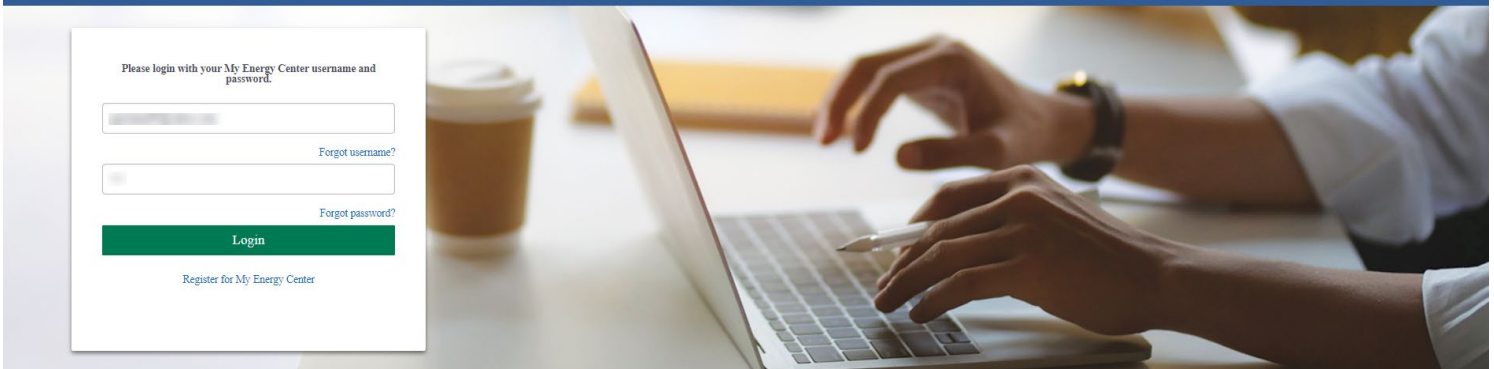
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## How to register

1. Choose **Log in to the Portal** from the [www.sdge.com/loa](http://www.sdge.com/loa) website. Select Customer Login. Click on **Register for My Energy Center** from the login screen.



Consent To Share



2. Follow the instructions on the screen to complete the registration. Once complete, you will receive an email for verification.

### Sign up for My Energy Center

**Step 1: Let's Get Started**

1 — 2 — 3 — 4 — 5

#### Your Information

Help us find you by providing key account information.

**What type of account do you have?**

Residential  Business

First Name

Last Name

**Search by:**

Email  Phone

Email

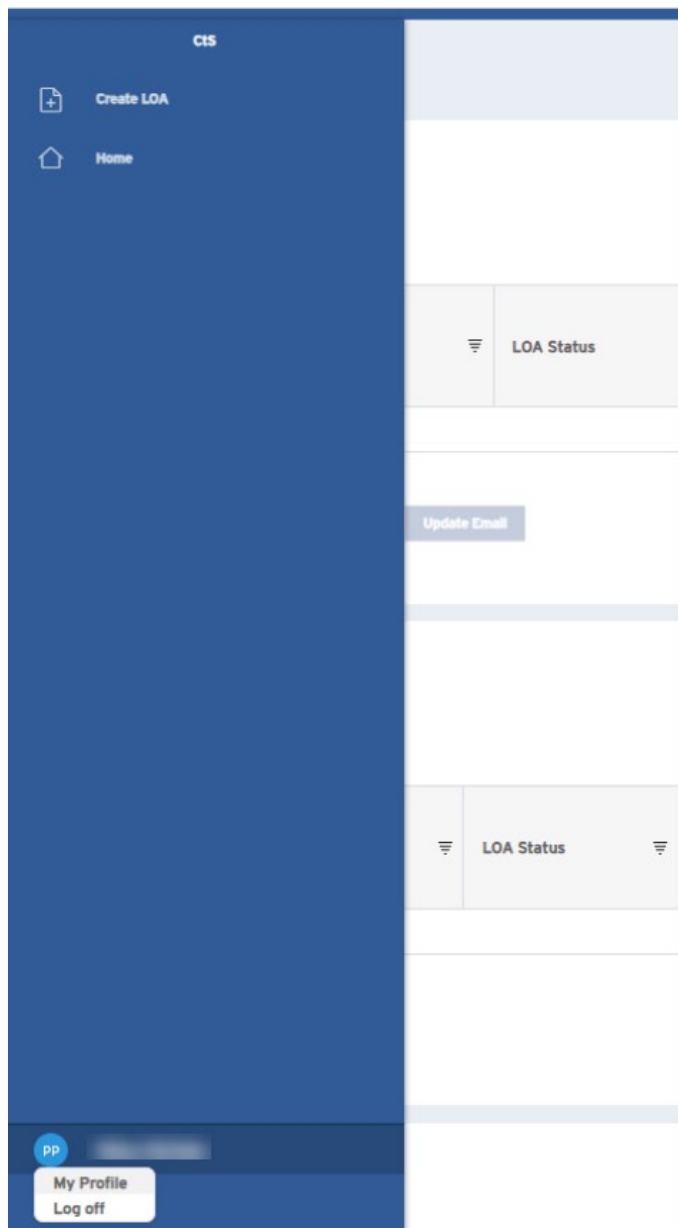
Cancel **Next**

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## How to view and update your profile information

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You may view your profile information from **My Profile**.



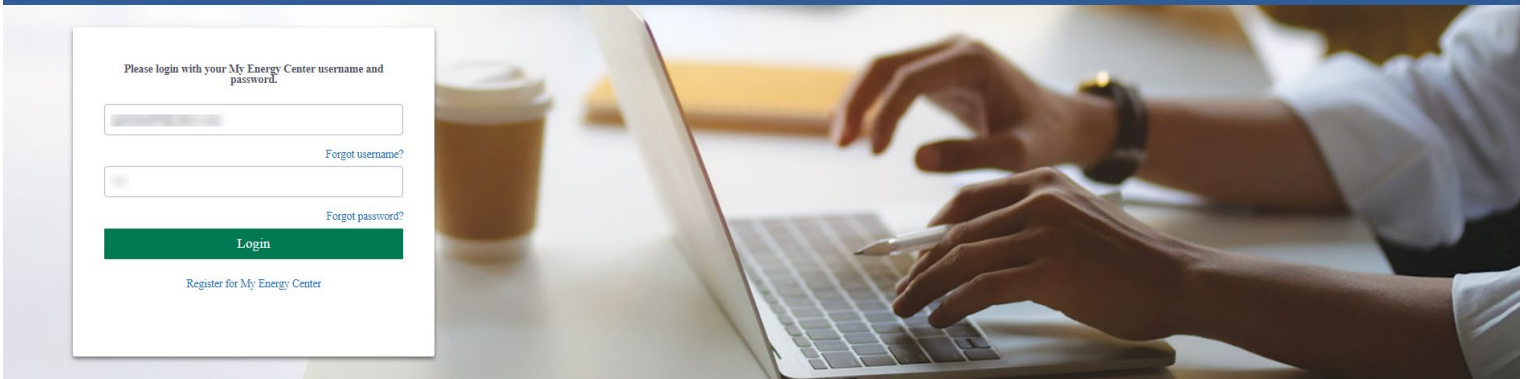
If you wish to update your profile information, please log into **My Energy Center** using [myenergycenter.sdge.com](https://myenergycenter.sdge.com).

## How to create a Standard CISR LOA electronically

1. Choose Log in to the **Portal** application from the [www.sdge/loa](http://www.sdge/loa) website. Input your SDG&E My Energy Center credentials.



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



Search Site

Consent To Share

**My Open LOAs**

Refresh

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	Delegated Third Party Email
No Items													

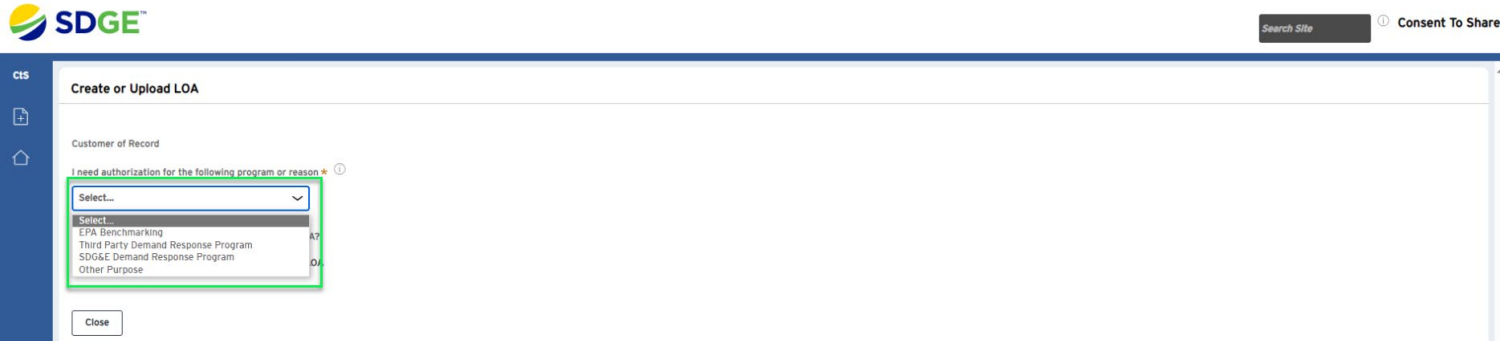
Cancel LOAs   Reject LOA   Update Email

**My Active LOAs**

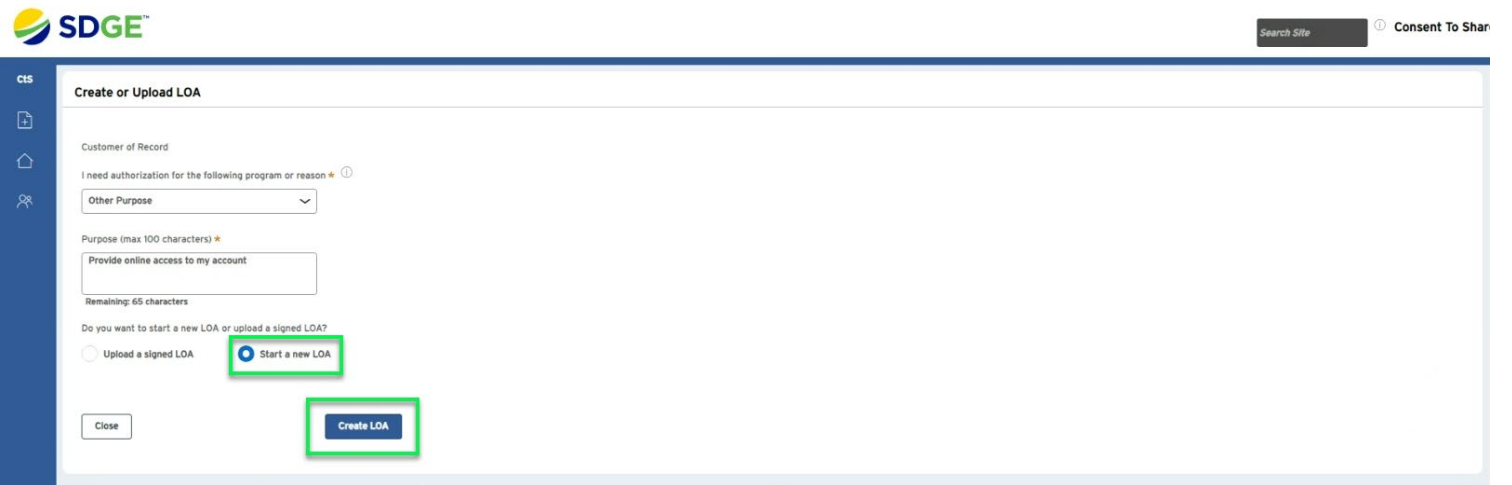
Refresh

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	Delegated Third Party Email
No Items													

3. A new screen will be displayed where you may select the reason for your LOA. If you select '**Third Party Demand Response Program,**' an LOA specific for the DR program will be created, e.g., a CISR-DRP. If any other option is selected, a Standard LOA will be initiated which is also called a StandardCISR.



4. By default, '**Start a new LOA**' will be selected. This will initiate the electronic process to create the LOA. If you have the signed LOA and wish to upload it, select '**Upload a signed LOA**' and then choose '**Create LOA.**'



5. A questionnaire will display on the screen asking for initials and number of accounts associated with LOA request.



6. Provide responses to the rest of the questions that appear on the screen. Then click on **Submit** button.

**Standard CISR Questionnaire**

By initialing here, you are granting SDG&E consent to fill out the Standard CISR form on your behalf.

How many service accounts will you be including in this request? \*

1

Would you like the Third Party to act on your behalf (e.g. a property manager or utility manager)? \*

Yes

No

Are you working with a property owner who is benchmarking your building? \*

Yes

No

Are you working with an energy efficiency expert (i.e., solar company, consultant, energy engineering org., etc.) to better manage your energy usage? \*

Yes

No

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

One time

One year

Until this date (three years maximum) M/d/yyyy

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? \*

Cancel Submit

7. An online form will be displayed to fill out the necessary information for the LOA. Fields marked with '\*' are mandatory to complete.
8. Verify the information in the **Customer Contact Information** section. The basic information from your profile will be auto populated for ease of use. Provide a **valid email address**. This email will be used by SDG&E as a primary contact for all correspondences related to this LOA. The **mailing address and phone** number will be used as secondary contact information.

**Important:** The **First Name and Last Name** you enter in the form must match what you provided when starting the account with SDG&E. You may find this information in your SDG&E bill. Mismatch in the name would fail SDG&E validation and the LOA may be sent back to you for correction. This could delay the overall process. Note, the information provided within the fields must be unique and cannot match the same information provided for the Primary Third Party/DRP contact information.

9. Now enter the **Service Address Information**. Provide all the service accounts under your name for which you would like to authorize Third Party access. You may add a service account using either of these options:
  - a. Add service account numbers one by one by clicking the **'Add account number'** link. Then, enter the details directly into the table displayed on the screen.
  - b. If you have many accounts to add, then download the template by clicking the link. Add your accounts in the template and save the file. Then, upload the file using the **'Choose File'** button. Once uploaded, click **'Bulk Upload Service Accounts'** to complete the upload.



- Enter the **Primary Third Party/DRP Contact Information** to the best of your knowledge and click **'Next.'** This information will be reviewed and updated by the Third Party before they sign. **The important information is the email address.** Make sure you have the correct email address of the Third Party before proceeding. Note, the information provided within the fields must be unique and cannot match the same information provided for the Customer Contact Information.

**Important:** SDG&E will contact the Third Party at this email address to obtain their signature.

- In the next screen, you may provide specific authorizations to the customer by providing your initials in the respective boxes. If you do not find the relevant option, then **initial Option 9** and provide the authorization description. You may provide more than one authorization by initialing all the relevant boxes. The Third Party will be authorized to perform/access your data per the options you choose. In the same screen, you may specify the duration for the LOA to be considered valid. Per the California Public Utilities Commission (CPUC) guidelines, the LOA can be authorized up to 3 years at a time.

**Important:** The authorizations you provide in this screen are not changeable by the Third Party.

**Customer Actions 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 (Corwin Delight) authorize my Agent to act on my behalf to perform the following specific acts and actions (initial all applicable boxes but at least one MUST be initialed): \*

1. Request and receive billing records history and all meter usage data used for bill calculation for all of my account(s), as specified herein, regarding utility services furnished by the Utility
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 (Corwin Delight) authorize the release of my account information and authorize my agent to act on my behalf on the following basis (initial one box only):

- One time authorization only
- One year authorization
- Authorization is given for the period commencing with date of execution until

End date \*

(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.

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

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

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

From \* To \*

12. In the next screen, click **'Review Filled LOA'** to download the information you completed in the previous screen in the PDF format. Review the information thoroughly. Read the declare statement displayed on the screen and select the checkbox 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 (IF APPLICABLE) \_\_\_\_\_  
of \_\_\_\_\_ (Customer) have the following mailing address \_\_\_\_\_  
MAILING 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) \_\_\_\_\_

<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 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

13. 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. Past 60 days, the LOA will automatically expire, and you will have to create a new one.

14. 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 by the application.

The screenshot displays the 'Legal Review' stage of a LOA (Letter of Authorization) process. The form is titled 'LOA-0000040158' and is currently in a 'DRAFT' status. The left sidebar shows 'LOA Actions' and 'LOA Actions -'. 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 actions with checkboxes for authorization. Action 2, 'EPA Benchmarking', is selected. Below this list, there are options for 'One time authorization only' and 'One year authorization', with 'One year authorization' selected. 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. Beginning on the date this LOA commences and ending on: [blank]. Authorization is given for the period commencing with date of execution until: [blank].'
- Electronic Signature:** A section with a checkbox for '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.' Below this is a declaration of consent. A signature is visible in a green box, with an 'Accept' button highlighted in red and a 'Clear' button.

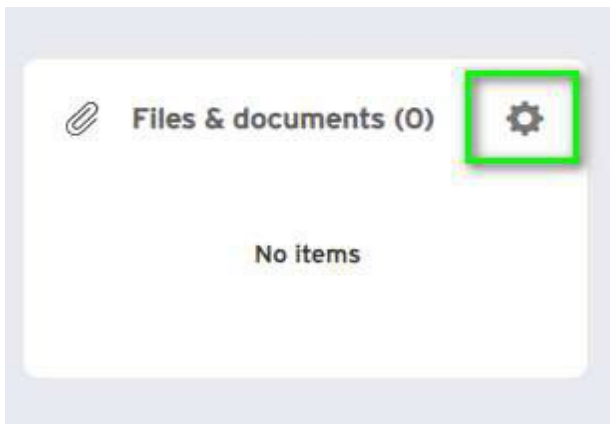
At the bottom of the form, there are buttons for 'Cancel', '< Back', 'Save and Close', and 'Complete Review'.

**Important:** Review the information thoroughly before signing. If you would like to make any changes, 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.

**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)**

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



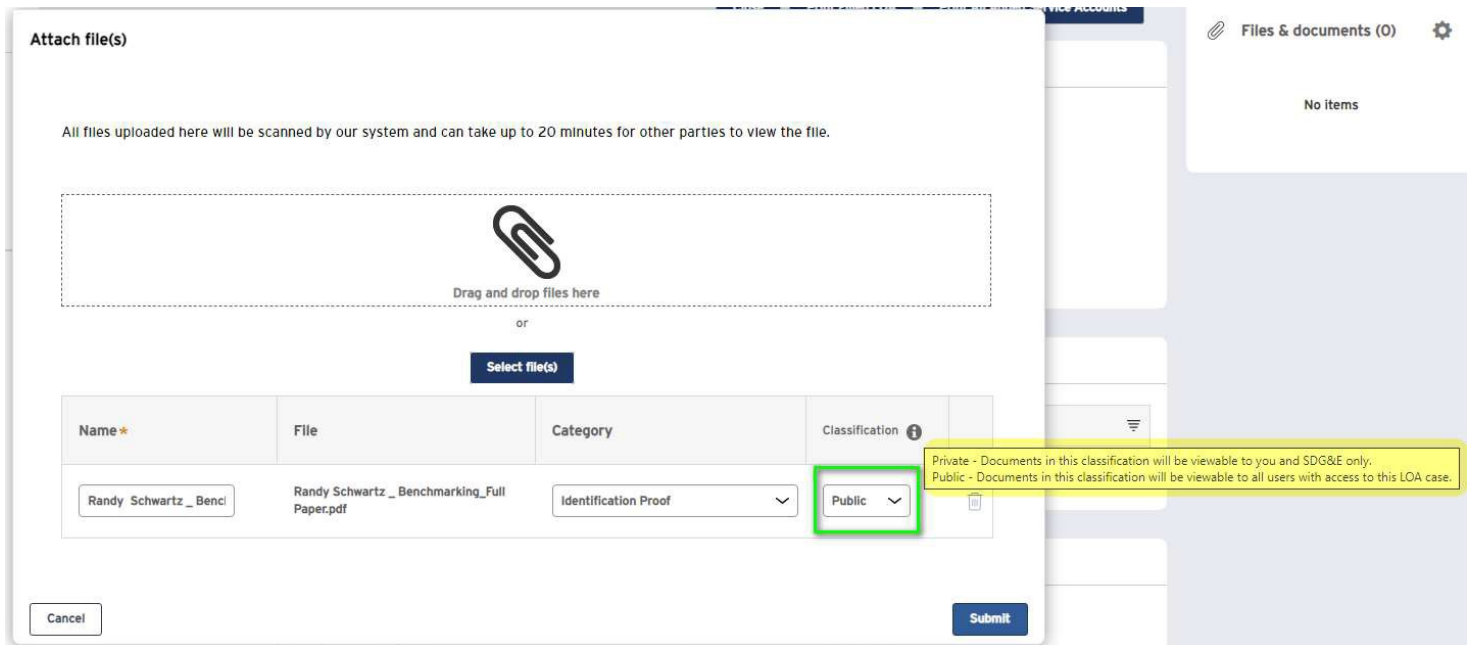
Drag and drop files here

or

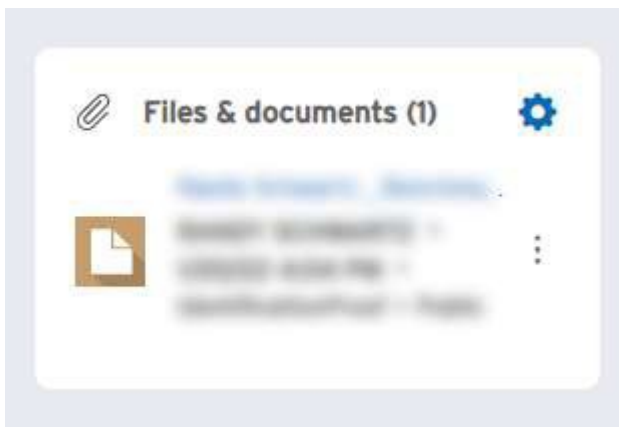
**Select file(s)**

Name *	File	Category	Classification 	
<input type="text"/>	<input type="text"/>	<div style="border: 1px solid gray; padding: 5px;"><p>LOA Form </p><p>Select...</p><p>LOA Form</p><p>List of Service Accounts</p><p><b>Identification Proof</b></p><p>Property/Rental/Lease Agreements</p><p>Utility Bill</p><p>Special Instructions</p><p>Revoke Document</p><p>Other</p></div>	<input type="text" value="Public"/>	

You may then choose the classification for the file to determine who can be allowed to see the attached file.



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



The screen also provides you with 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 Third Party. 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. This is most common for commercial customers. Select the checkbox provided just above the signature box to do so. Provide their email address where SDG&E will 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.

- When you sign and click **'Complete Review,'** an acknowledgment screen will be displayed. You will see that the status of the LOA is waiting 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 the **'Print Filled LOA'** 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	Full Name
Email address	Phone number
Mailing Address	Extension
Customer Signed Date	

**Service Account Information**

Fields Refresh

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

**Primary Third Party/DRP Information**

Full Name	Relationship Name
Email address	Relating Address
Phone number	Primary Third Party/DRP Phone
Extension	

**LOA Case Information**

LOA Type	Standard CISR	Start Date
Submission Process	Electronic	End Date
Purpose of LOA	EPA Benchmarking	Resolved Date
Purpose of LOA (Details)	EPA Benchmarking	Revoked Date

**Data Disclosure Information**

Frequency/Period	Multiple	Data Disclosure Method	--
Data Elements to Disclose	EPA Benchmarking	Additional Details	--
Other Acts and Functions	--	Data Disclosed?	No

Files & documents (1)

16. 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 Inbox x



do-not-reply-loa@sdge.com



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

Request ID: LOA-000040128

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 of the LOA.** The Third Party will receive an email requesting to sign the LOA. Once they sign, the LOA will be validated and activated by SDG&E. When the LOA is activated, you will receive an email with the completely executed LOA for your record keeping.

SDG&E Letter of Authorization Active Inbox x



do-not-reply-loa@sdge.com



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

Request ID : LOA-000040128

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 are a registered user, you can manage this LOA by visiting [sdge.com/cjs](https://sdge.com/cjs).

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).

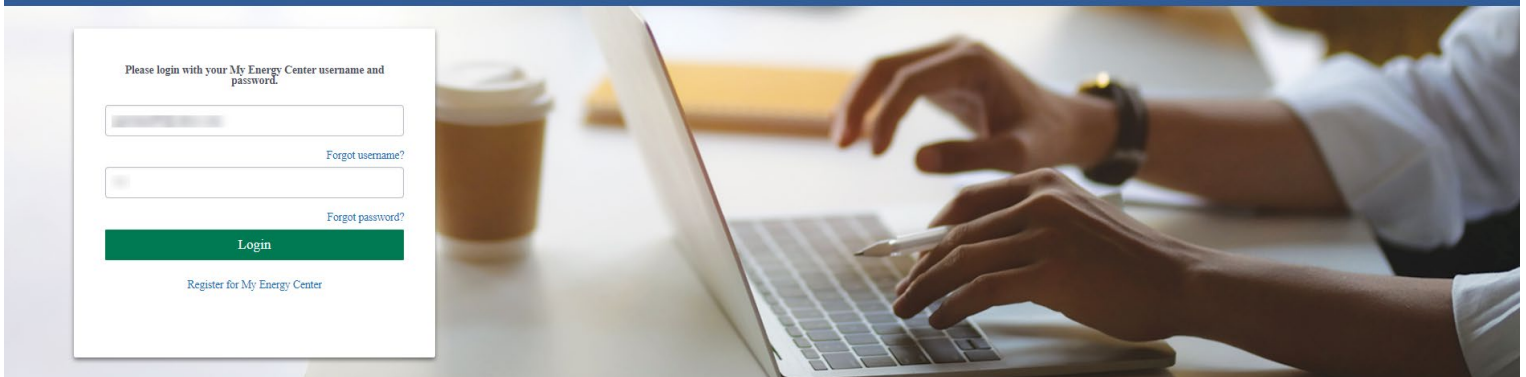
If there were any issues during validation, you will be notified about the next steps.

## How to create a CISR-DRP LOA electronically

1. **Log into** the CtS application with your SDG&E **My Energy Center** credentials.



Consent To Share



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



Search Site

Consent To Share

**My Open LOAs**

Refresh

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	Delegated Third Party Email
No Items													

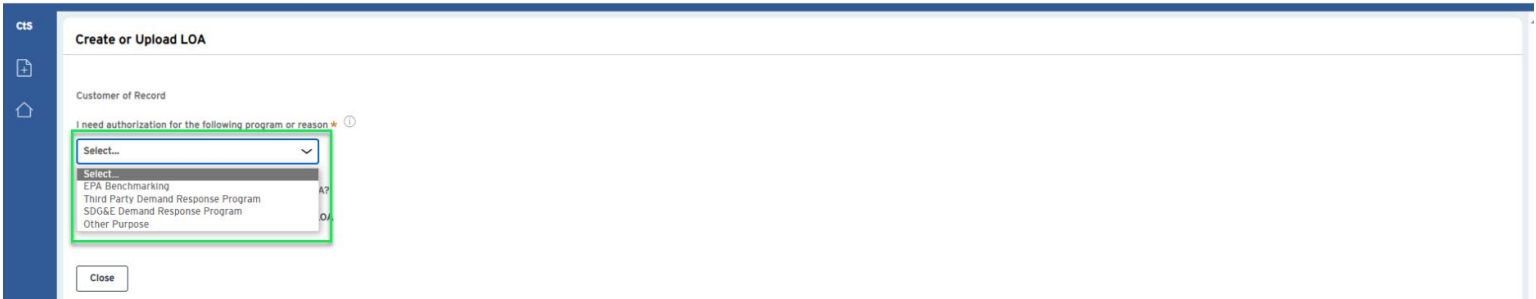
Cancel LOAs   Reject LOA   Update Email

**My Active LOAs**

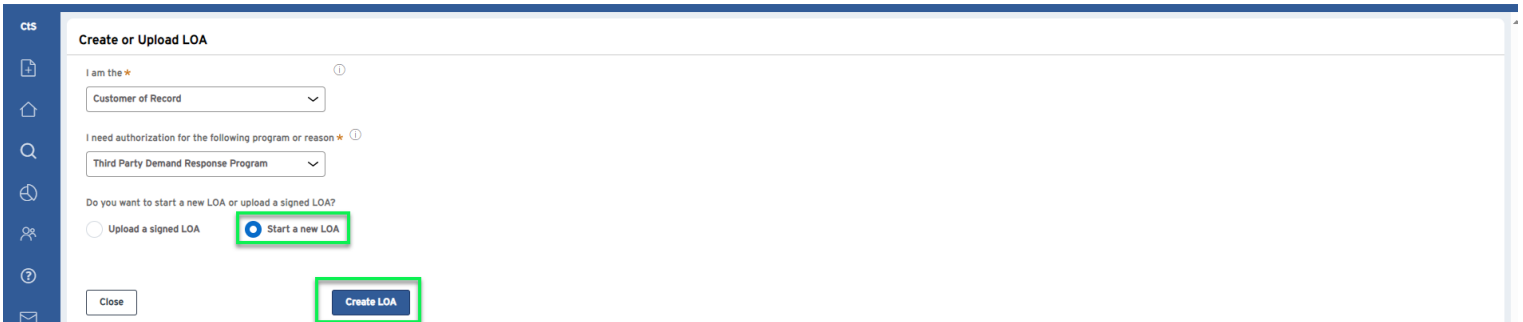
Refresh

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	Delegated Third Party Email
No Items													

3. A new screen will be displayed where you may select the reason for your LOA. Select **'Third Party Demand Response Program'** to initiate a CISR-DRP. If any other option is selected, a Standard LOA will be initiated which is also called a Standard CISR (shown in the previous section.)



- 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.'** Click **'Create LOA.'**



- An online form will be displayed to fill out the necessary information for the LOA. Fields marked with **'\*'** are mandatory to complete.
- Verify the information in the **Customer Contact Information** section. The basic information from your profile will be auto populated for ease of use. Provide a **valid email address**. This email will be used by SDG&E as a primary contact for all correspondences related to this LOA. The **mailing address and phone number** will be used as secondary contact information.

**Important:** The **First Name and Last Name** you enter in the form must match what you provided when starting the account with SDG&E. You may find this information in your SDG&E bill. Mismatch in the name would fail SDG&E validation and the LOA may be sent back to you for correction. This could delay the overall process.

7. Now enter the **Service Address Information**. Provide all the service accounts under your name for which you would like to authorize the Third-Party access. You may add service account using either of these options:
  - a. Add service account numbers one by one by clicking **'Add account number.'** Then, enter the details directly into the table displayed on the screen.
  - b. If you have many accounts to add, then download the template by clicking the link. Add your accounts in the template and save the file. Then, upload the file using the **'Choose File'** button. Once uploaded, click **'Bulk Upload Service Accounts'** to complete the upload.

8. Next, enter the **Primary Third Party/DRP Contact Information** to the best of your knowledge and click **'Next.'** This information will be reviewed and updated by the Third Party before they sign. **The important information is the email address.** Make sure you have the correct email address of the Third Party before proceeding.

**Important:** SDG&E will contact the Third Party on this email address to obtain their signature.

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.  
 No file chosen

Click "Upload Service Accounts" to complete the upload process and to add the service account numbers to the LOA.

**Primary Third Party / DRP Contact Information**

Organization Name \*  
 If Third Party is an individual, please enter "None"

SDG&E Rule 32 ID  
 Please provide the Rule 32 ID for the Primary DRP

Email address \*  
 Please provide the email address of the Third Party

Phone number \*  
 Enter a 10 digit phone number

Confirm Email Address \*  
 Please confirm the email address of the Third Party

Extension

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

Will a secondary DRP/Agent need access to the customer data for this program? \*

Yes  No

**Secondary Third Party / DRP Contact Information**

Organization Name \*  
 Please provide the organization name for the Secondary DRP

SDG&E Rule 32 ID  
 Please provide the Rule 32 ID for the Secondary DRP

Email address \*  
 Please provide the email address of the Secondary DRP

Phone number \*  
 Enter a 10 digit phone number

Confirm Email Address \*  
 Please confirm the email address of the Secondary DRP

Extension

10. In the next screen, click 'Review Filled LOA' to download the information you completed in the previous screen in the PDF format. Review the information thoroughly. Read the declare statement displayed on the screen and select the checkbox accordingly if you agree.

Contact & Service Account Info
Legal Review

Close
Print Filled LOA
Print All Added Service Accounts

Review Filled LOA

Review All Added Service Accounts

If you added more than two Service Accounts, you may review those by clicking "Review All Added Service Accounts."

PLEASE CHECK THIS BOX TO CONFIRM YOU HAVE READ THE STATEMENT BELOW \*

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.

Close
Submit

Check box.

**CUSTOMER INFORMATION SERVICE REQUEST FOR DEMAND RESPONSE PROVIDERS (CISR-DRP)**

**IMPORTANT INFORMATION FOR CUSTOMERS THIS IS A LEGALLY BINDING CONTRACT - READ IT CAREFULLY**

San Diego Gas & Electric Company's (SDG&E's) Electric Rule 33 and its corresponding privacy policies, which can be found at <http://www.sdge.com/customer-privacy>, limit the disclosure of your personal information, such as your name, address, phone number, or electric account and billing information, to third parties unless you expressly authorize us to do so. This form facilitates the disclosure of your personal energy-related data to non-affiliated Demand Response Providers (DRPs) so that you may obtain Demand Response services offered by such DRPs in accordance with SDG&E's Electric Rule 32, which can be accessed at [http://regaffairs.sdge.com/html2pdf/ELEC\\_RULES\\_ERULE32.pdf](http://regaffairs.sdge.com/html2pdf/ELEC_RULES_ERULE32.pdf). This form may be used to authorize the release of Bundled, Community Choice Aggregation (CCA), and Direct Access (DA) customer information. In some cases, two DRPs may collaborate to provide customers with Rule 32 Demand Response services. Accordingly, this form allows for disclosure of your information to both a Primary DRP and an optional Secondary DRP. Once you authorize the DRPs to access your personal energy-related data, you are responsible for ensuring that the DRPs safeguard this information from further disclosure without your consent. This authorization is separate from any other agreements between you and any DRP for Demand Response services. This form also permits your Primary and Secondary DRP the ability to request SDG&E make limited changes to the SDG&E electric meter(s) serving the service account(s) being enrolled in Demand Response services, as specified in Section C below.

I, (Customer),

Customer Name According to SDG&E Records			
Contact Name (if different from above)	First	Last	Phone
E-Mail			
<i>(Either an e-mail address or phone number is required.)</i>			

do hereby (check only one):  AUTHORIZE (sign Section D)  REVOKE (sign Section H)

access to my personal energy-related data for the following DRP(s):

Name of Primary DRP	SDG&E Rule 32 ID	Phone
E-Mail		

Complete the following table only if you are authorizing data to be released to a Secondary DRP

Name of Secondary DRP	SDG&E Rule 32 ID	Phone
E-Mail		

Concerning the following service accounts:

SERVICE ADDRESS (NUMBER AND STREET)	SERVICE CITY	SERVICE ACCOUNT #

*(You can include additional service agreements by attaching a list to this form.)*

Page 1 of 3      Form 144-0820 04/2018

**CUSTOMER INFORMATION SERVICE REQUEST FOR DRP (CISR-DRP)**

FOR AUTHORIZATION USE ONLY

**A. TIMEFRAME OF AUTHORIZATION (check only one option)**

Begin today and continue until \_\_\_\_\_ (mm/dd/yyyy) or until revoked by customer or DRP.

Begin today and continue indefinitely or until revoked by Customer or DRP.

**B. SUMMARY OF INFORMATION AUTHORIZED TO BE RELEASED**

I, (Customer), 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, (Customer), 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, (Customer), 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, (Customer), 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, (Customer), 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.

Authorized Signature of Customer
Date Signed (mm/dd/yyyy)

**CUSTOMER INFORMATION SERVICE REQUEST FOR DRP (CISR-DRP)**

FOR REVOCATION USE ONLY

**E. PRIMARY DRP'S AGREEMENT REGARDING CUSTOMER RELEASE AUTHORIZATION**

I, (Primary DRP), hereby agree to comply with this agreement, and to release, hold harmless, and indemnify SDG&E from any liability, claims, demands, 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.

Authorized Signature of First DRP
Date Signed (mm/dd/yyyy)

**F. SECONDARY DRP'S AGREEMENT REGARDING CUSTOMER RELEASE AUTHORIZATION**

I, (Secondary DRP), hereby agree to comply with this agreement, and to release, hold harmless, and indemnify SDG&E from any liability, claims, demands, 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.

Authorized Signature of Second DRP
Date Signed (mm/dd/yyyy)

**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.

**H. CUSTOMER REVOCATION OF AUTHORIZATION**

I, (Customer), hereby revoke the authorization to release information to the DRP(s) listed above. I hereby release, hold harmless, and indemnify SDG&E from any liability, claims, demands, causes of action, damages, or expenses resulting from: (1) this revocation; (2) any refusal to release information to the DRP(s) pursuant to this revocation; and (3) any conduct by the DRP(s) in connection with this revocation. If submitted electronically, I hereby indicate my consent to the use of electronic authorization.

Authorized Signature of Customer or Its Agent
Date Signed (mm/dd/yyyy)

**I. DRP REVOCATION OF AUTHORIZATION/DISCONTINUANCE FROM DEMAND RESPONSE SERVICE**

I, (DRP), hereby revoke the authorization to release the Customer's information to the above designated DRP(s). Further, I hereby notify SDG&E that the date of the Customer's actual or anticipated revocation or discontinuance from my Demand Response services is \_\_\_\_\_ (mm/dd/yyyy). I hereby release, hold harmless, and indemnify SDG&E and its agents from any liability, claims, demands, causes of action, damages, or expenses resulting from: (1) this revocation; (2) any refusal by SDG&E to release information to the DRP(s) pursuant to this revocation; (3) any conduct by my DRP(s) in connection with this revocation; and (4) my DRP(s)'s failure to timely notify SDG&E of the Customer's revocation or discontinuance from my Demand Response services. If submitted electronically, I hereby indicate my consent to the use of electronic authorization.

Authorized Signature of DRP
Date Signed (mm/dd/yyyy)

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. Past 60 days, the LOA will automatically expire, and you will have to create a new one.
12. In the final **Review** screen, you will be asked to choose the duration of the LOA and for your signature. Click **'Complete Review'** when done.

**Important:** Click **'Accept'** after signing. Only then the signature will be accepted by the application.

CIS

LOA-000041133

LOA Actions

Purpose: Third Party Demand Response Program

Start Date: --

End Date: --

Status: DRAFT

Created: 01/21/22 10:00:00 AM

Contact & Service Account Info | Legal Review | Review and Sign

Close | Print Filled LOA | Print All Added Service Accounts

Files & documents (0)

No items

### Customer Contact Information

Type: Residential Phone number: 916-444-1234

Full Name: John Doe

Email address: john.doe@example.com

### Service Address Information

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

### Primary Third Party/DRP Contact Information

Organization Name: ABC Company Rule 32 ID: 12345

Email address: john.doe@example.com Phone number: 916-444-1234

### Customer Authorizations

A. TIMEFRAME OF AUTHORIZATION (check only one option) \*

Begin today and continue until \_\_\_\_/\_\_\_\_/\_\_\_\_ (mm/dd/yyyy) or until revoked by customer or DRP

Begin today and continue indefinitely or 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 accounts 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.

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: 1/21/22

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.

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

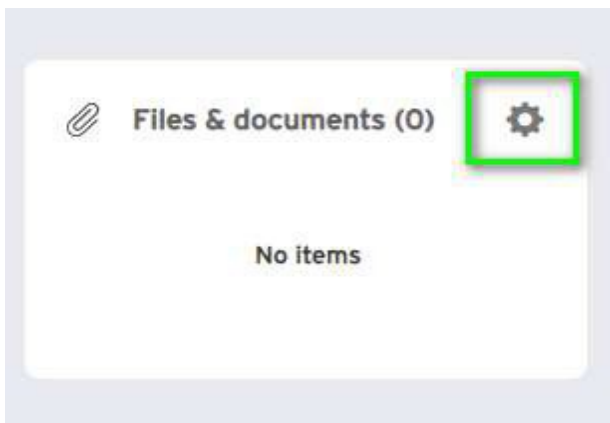


**Important:** Review all the information thoroughly before signing. If you would like to make any changes, please use the **'Back'** button at the bottom of the screen. You may also use the links provided at the top of the screen to navigate to a specific screen.



In the same screen, you may also upload 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.

**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)**

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



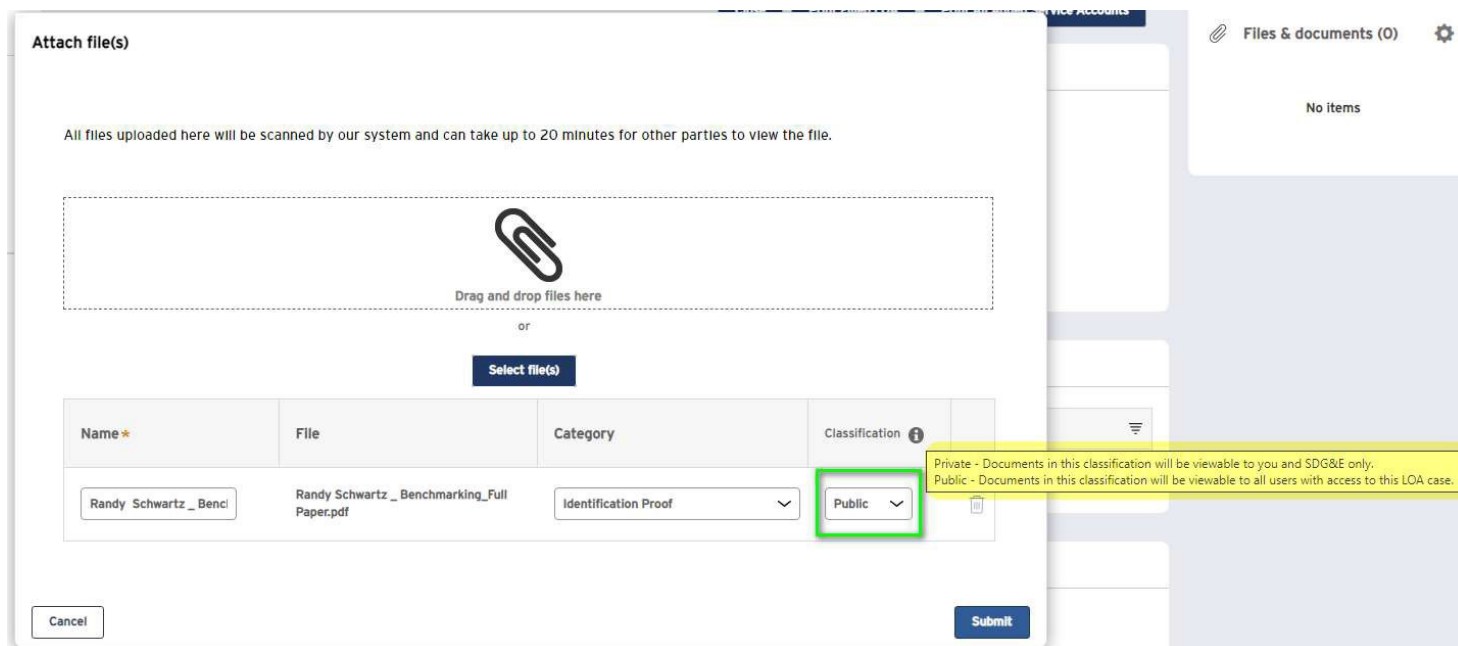
Drag and drop files here

or

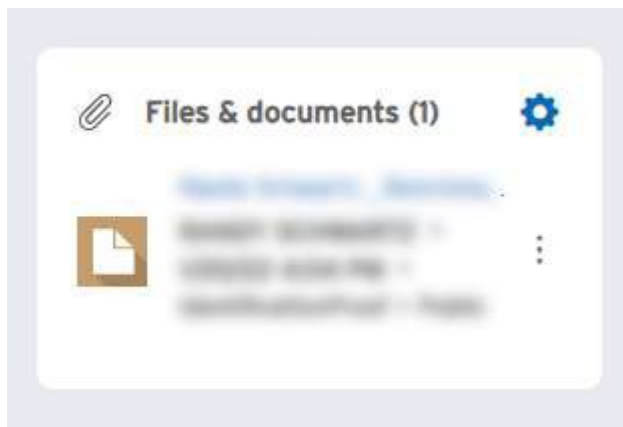
**Select file(s)**

Name *	File	Category	Classification ⓘ	
<input type="text"/>	<input type="text"/>	<div style="border: 1px solid gray; padding: 5px;"><p>LOA Form ▾</p><p>Select...</p><p>LOA Form</p><p>List of Service Accounts</p><p><b>Identification Proof</b></p><p>Property/Rental/Lease Agreements</p><p>Utility Bill</p><p>Special Instructions</p><p>Revoke Document</p><p>Other</p></div>	<input type="text" value="Public"/>	<input type="button" value="🗑"/>

You may then choose the classification for the file to determine who can be allowed to see the file attached.



When 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. This is most common for commercial customers. Select the checkbox provided just above the signature box to do so. Provide their email address where SDG&E will 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.

- When you sign and click **'Complete Review,'** an acknowledgment screen will be displayed. You will see that the LOA is now in the status waiting 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 the **'Print Filled LOA'** button at the top of the screen or from the **'Files and Documents.'**

The screenshot shows the LOA management interface for LOA-0000041133. The status is 'PENDING-THIRD PARTY SIGNATURE'. The interface includes sections for Customer Information, Service Account Information, Primary Third Party/DRP Information, and LOA Case Information. A 'Files and documents' sidebar on the right shows a document titled 'LOA-0000041133\_RANDYS...' with a 'Print Filled LOA' button at the top of the main content area.

Type	Electronic	Full Name	RANDY SCHWARTZ
Email address	randyschwartz@sdge.com	Phone number	619-444-4444
Extension	--	Customer Signed Date	1/21/22

Service Account Number	Service Address	Service City
00000000000000000000	00000000000000000000	00000000000000000000

Full Name	Organization Name	Rule 32 ID
00000000000000000000	00000000000000000000	--
Email address	Primary Third Party/DRP Signed Date	
00000000000000000000	--	
Phone number		
619-444-4444		
Extension		
--		

LOA Type	CISR-DRP	Start Date	1/21/22
Submission Process	Electronic	End Date	1/21/22
Purpose of LOA	Third Party Demand Response Program	Resolved Date	--
Purpose of LOA (Details)	Third Party Demand Response Program	Revoked Date	--

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.

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

Request ID: LOA-0000041133

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

If you have any questions or concerns, email us at [cisr-drp@sdge.com](mailto:cisr-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 of the LOA.** The Third Party will receive an email requesting to sign the LOA. Once they sign, the LOA will be validated and activated by SDG&E. When the LOA is activated, you will receive an email with the completely executed LOA for your record keeping.

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

Request ID : LOA-0000040109

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 are a registered user, you can manage this LOA by visiting [sdge.com/cts](https://sdge.com/cts).

If you have any questions or concerns, email us at [cisr-drp@sdge.com](mailto:cisr-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).

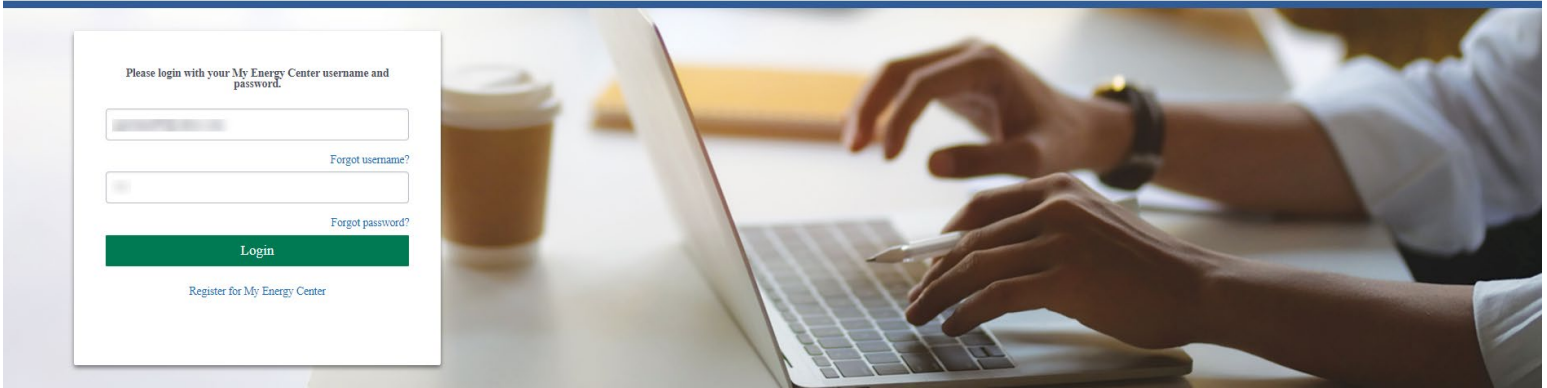
If there were any issues during validation, you will be notified about the next steps.

## How to create a Non-Standard LOA electronically

1. **Log into the CTS application with your SDG&E My Energy Center credentials.**



Consent To Share



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



Search Site

Consent To Share

**My Open LOAs**

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	Delegated Third Party Email
No Items													

**My Active LOAs**

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	Delegated Third Party Email
No Items													

3. A new screen will be displayed where you may select the reason for your LOA. If you select **'Third Party Demand Response Program,'** you are not allowed to submit a Non-Standard LOA.



Search Site

Consent To Share

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



Search Site

Consent To Share

5. Select **'Signed Non-Standard LOA'** from the next dropdown.



Search Site

Consent To Share

6. Visual examples of the acceptable forms will display on the screen. Then, click the **Submit** button.

7. An online form will be displayed to fill out the necessary information for the LOA. Fields marked with ‘\*’ are mandatory to complete.
  
8. Verify the information in the **Customer Contact Information** section. The basic information from your profile will be auto populated for the ease of use. Make sure to provide a **valid email address**. This email will be used by SDG&E as primary contact for all correspondences related to this LOA. The **mailing address and phone number** will be used as secondary contact information. Enter the **date when you signed the authorization**. This could be a date in the document/agreement you plan to attach or can be today’s date. This cannot be a future date.

**Important:** The **First Name and Last Name** you enter in the form must match to what you provided when starting the account with SDG&E. You may find this information in your SDG&E bill. Mismatch in the name would fail SDG&E validation and the LOA may be send back to you for correction. This could delay the overall process. Note, the information provided within the fields must be unique and cannot match the same information provided for the Primary Third Party/DRP contact information.



9. Now enter the **Service Address Information**. Provide all the service accounts under your name for which you would like to authorize the Third-Party access. You may add service account using either of these options.

Add service account numbers one by one by clicking ‘**Add account number.**’ Then, enter the details directly into the table displayed on the screen.

If you have many accounts to add, then download the template by clicking the link. Add your accounts in the template and save the file. Then, upload the file using the ‘**Choose File**’ button. Once uploaded, click ‘**Bulk Upload Service Accounts**’ to complete the upload.

- Next, enter the **Primary Third Party/DRP Contact Information** to the best of your knowledge. Enter the method of delivery for the data and click **'Next.'** Note, the information provided within the fields must be unique and cannot match the same information provided for the Customer Contact Information.

The screenshot displays the 'Primary Third Party / DRP Contact Information' form within the SDGE web application. The form is divided into several sections:

- Organization Name:** A text field with a placeholder: "If Third Party is an individual, please enter 'None'".
- Mailing Country:** A dropdown menu with "Select..." as the current selection.
- First Name:** A text field with a red asterisk and a placeholder: "Please provide the first name of the Third Party".
- Last Name:** A text field with a red asterisk and a placeholder: "Please provide the last name of the Third Party".
- Date Third Party Signed:** A text field with a red asterisk and a calendar icon.
- Phone number:** Two text fields labeled "Phone number" and "Extension". The "Phone number" field has a placeholder: "Enter a 10 digit number".
- Mailing Address:** A text field with a placeholder: "Please provide the third party mailing address.".
- Mailing City:** A text field with a placeholder: "Please provide the Third Party city.".
- Mailing State / Province:** A dropdown menu with "CA" selected.
- Mailing Zip:** A text field with a placeholder: "Please provide the Third Party zipcode.".
- Email address:** A text field with a placeholder: "Please provide the email address of the Third Party".
- Confirm Email Address:** A text field with a placeholder: "Please confirm the email address of the Third Party".

Below the form fields, there is a section titled "The Utility will provide the information requested above, to the extent available, via any one of the following channels. My (Agent) preferred format is:" with a red asterisk. This section contains three radio button options:

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

- In the next screen, you may provide specific authorizations to the customer by providing your initials in the respective boxes. If you do not find the relevant option, then initial **Option 9** and provide the authorization description. You may provide more than one authorization by initialing all the relevant boxes. The Third Party will be authorized to perform/access your data per the options you choose.

Customer Actions Authorized

Please review and indicate the actions authorized by your document. (Must mark at least one) \*

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.

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)

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

**Customer Actions Authorized**

Please review and indicate the actions authorized by your document. (Must mark at least one) \*

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.

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)

**Timeframe of Authorization**

Start Date \*  End Date \*   End date: Until Customer Revokes

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

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.

Please click the "Attach Document(s)" button to upload the non-standard LOA.

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

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

From \*  To \*

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

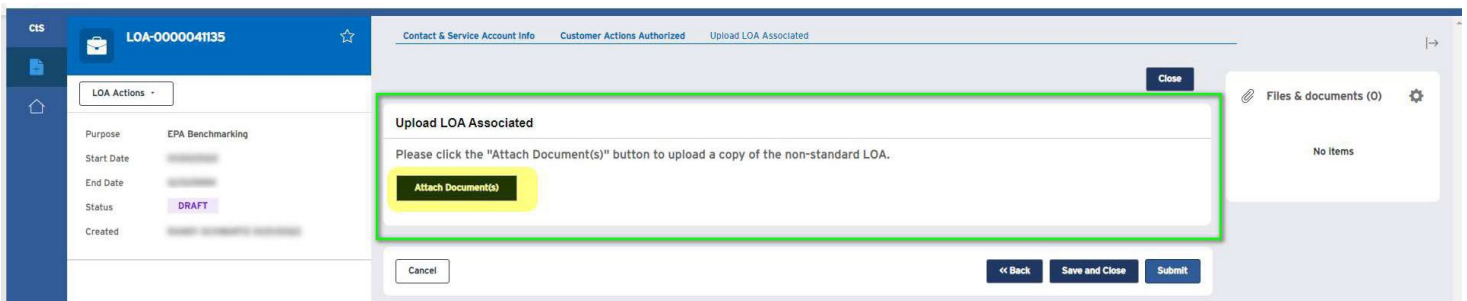
Would you like to make a data request or include special instructions with this LOA?

- 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 \*

14. In this same 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 on 'Attach 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.



Cancel

Attach

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



or

Select file(s)

Name *	File	Category	Classification	
<input type="text"/>		<div style="border: 2px solid green; padding: 5px;"><p>LOA Form </p><p>Select...</p><p>LOA Form</p><p>List of Service Accounts</p><p><b>Identification Proof</b></p><p>Property/Rental/Lease Agreements</p><p>Utility Bill</p><p>Special Instructions</p><p>Revoke Document</p><p>Other</p></div>	Public	

You may then choose the classification for the file to determine who should be allowed to see the file attached.



### 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.



or

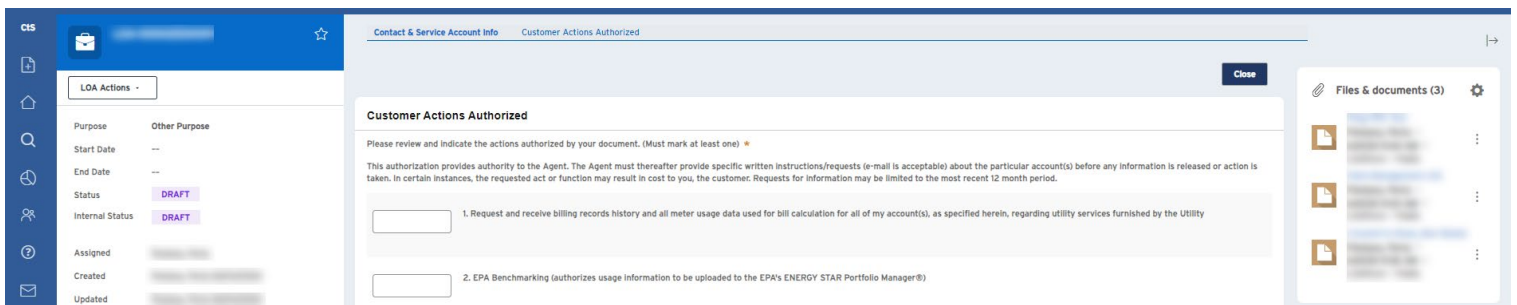
Select file(s)

Name *	File	Category	Classification <span>ⓘ</span>	
<input type="text"/>		LOA Form	<div style="border: 1px solid green; padding: 5px;">           Public <span>⌵</span>            Select...            Customer Only            Internal  <b>Public</b>            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.

When you click 'attach,' you will see the file under the 'Files and Documents' section.



- Click 'Submit.' An acknowledgment screen will be displayed. You will see that the LOA's status is waiting for SDG&E validation. You can no longer make changes to the LOA. Unlike the Standard CISR and CISR-DRP LOAs, these Non-Standard requests do not go to the Third Party for signature. This is on the assumption that the agreement/document you uploaded in the previous step is sufficient to grant authorizations.

LOA-0000041135

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.

**LOA Actions**

Purpose: EPA Benchmarking

Start Date: [REDACTED]

End Date: [REDACTED]

Status: **PENDING-SDG&E VALIDATION**

Created: [REDACTED]

**Customer Information**

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

**Service Account Information**

[Fields] [Refresh]

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

**Primary Third Party/DRP Information**

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

**LOA Case Information**

LOA Type	Non Standard	Start Date	[REDACTED]
Submission Process	Electronic	End Date	[REDACTED]
Purpose of LOA	EPA Benchmarking	Resolved Date	--
Purpose of LOA (Details)	EPA Benchmarking	Revoked Date	--

**Data Disclosure Information**

Frequency/Period	Multiple	Data Disclosure Method	Email
Data Elements to Disclose	EPA Benchmarking	Additional Details	[REDACTED]
Other Acts and Functions	--	Data Disclosed?	No

16. 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 Inbox x



do-not-reply-loa@sdge.com



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

Request ID: LOA-0000041135

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](#) 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](#)

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](#).

**You have now completed the submission process of the LOA.** Once the LOA is validated and activated by SDG&E you will receive an email.

SDG&E Letter of Authorization Active Inbox x



do-not-reply-loa@sdge.com



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

Request ID : LOA-0000041135

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.

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](#)

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](#).

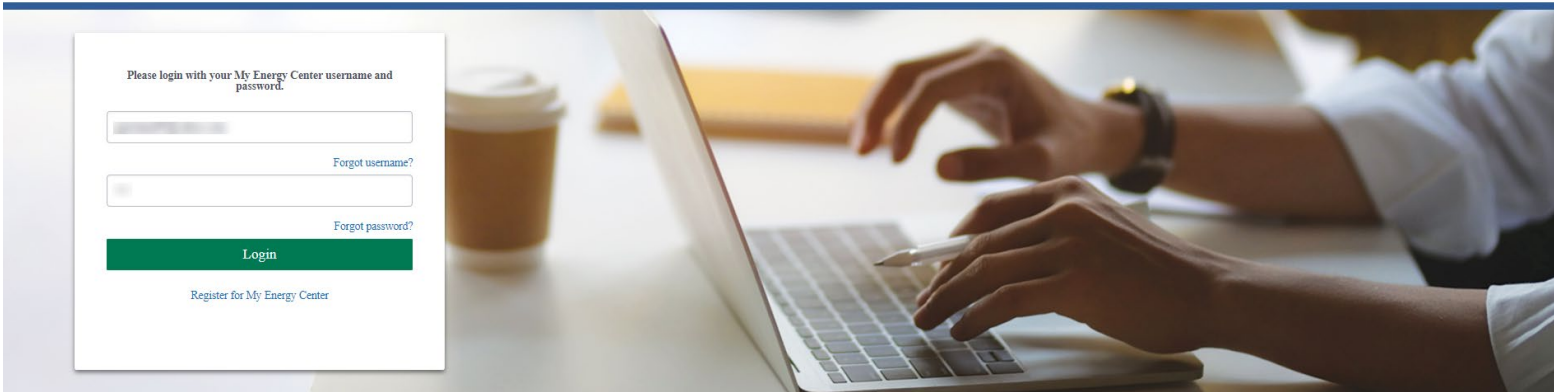
If there were any issues during validation you will be notified about the next steps.

## How to upload a signed Standard LOA PDF

1. Choose Log in to the Portal from the [www.sdge.com/loa](http://www.sdge.com/loa) website. Select Customer Login. Log into the CtS application with your SDG&E My Energy Center credentials.



Consent To Share



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



Search Site

Consent To Share

**My Open LOAs**

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	Delegated Third Party Email
No Items													

**My Active LOAs**

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	Delegated Third Party Email
No Items													

3. A new screen will be displayed where you may select the **reason for your LOA**. If you select 'Third Party Demand Response Program,' you are not allowed to submit a Non-Standard LOA.



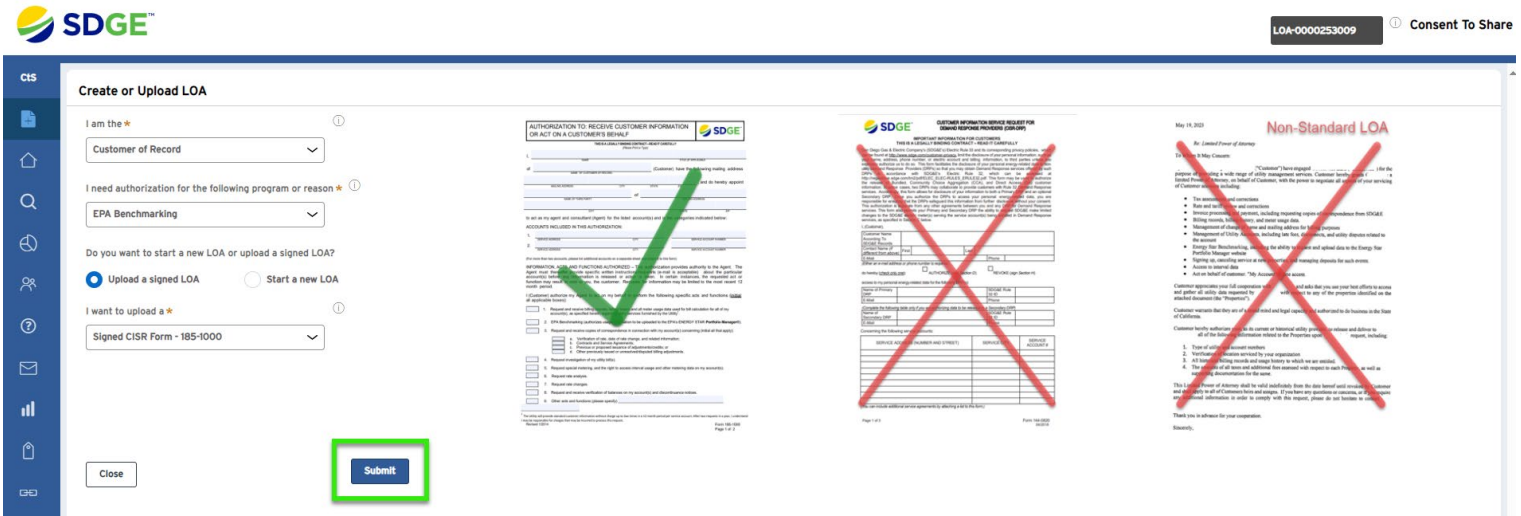
4. Select **'Upload a signed LOA'** to create the Non-Standard LOA. By default, **'Start a new LOA'** will be selected.



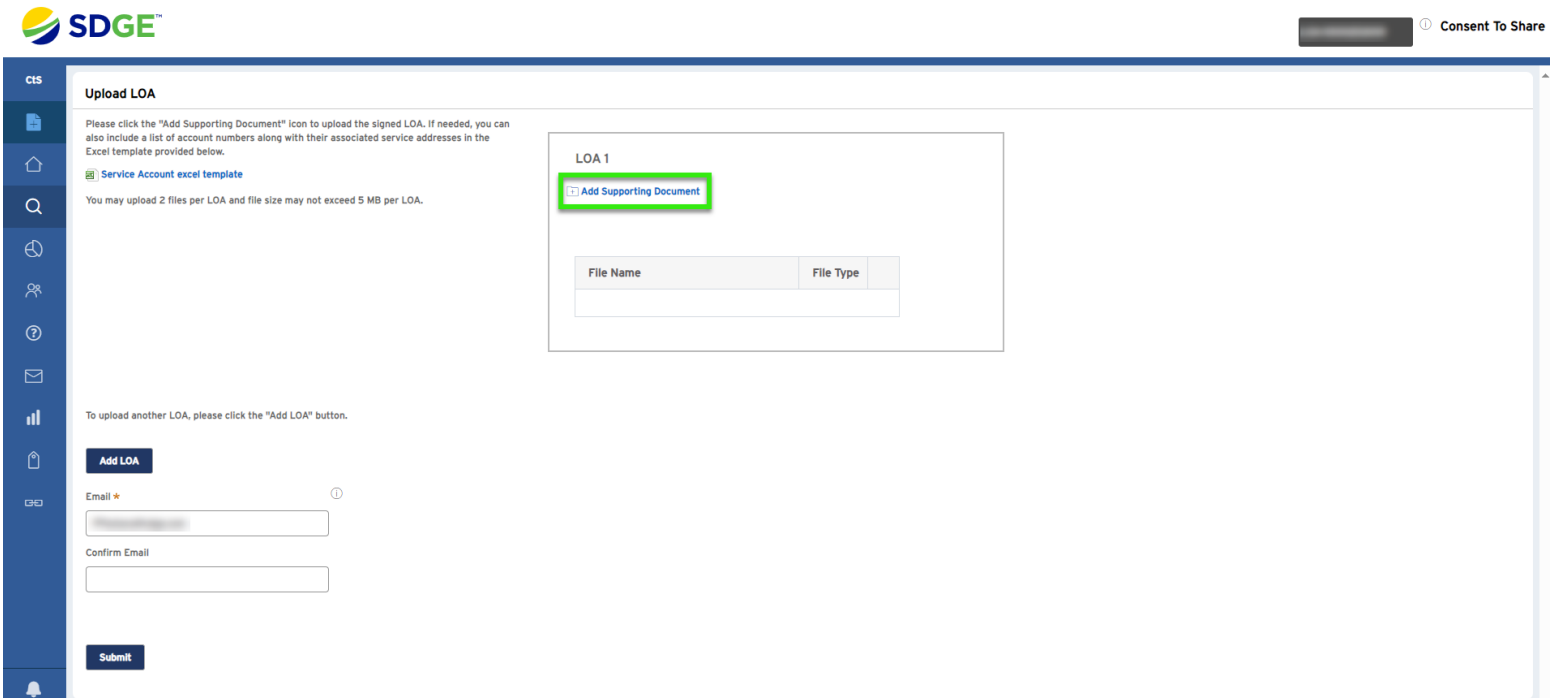
5. Select **'Signed CISR Form'** from the next dropdown.



6. Images of an acceptable CISR Form will display on the screen. Click the **'Submit'** button.



7. Click on 'Add Supporting Document' to upload the signed PDF, list of service account template, and any other attachments.



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 on 'Choose File' and an upload wizard will be displayed.

### Add document to LOA



File Name  No file chosen

Cancel

Submit

9. Once uploaded, click 'Submit.'

### Add document to LOA



File Name  LOA.pdf

Cancel

Submit

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

**Upload LOA**

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

[Service Account excel template](#)

You may upload 2 files per LOA and file size may not exceed 5 MB per LOA.

File Name	File Type
LOA	pdf

To upload another LOA, please click the "Add LOA" button.

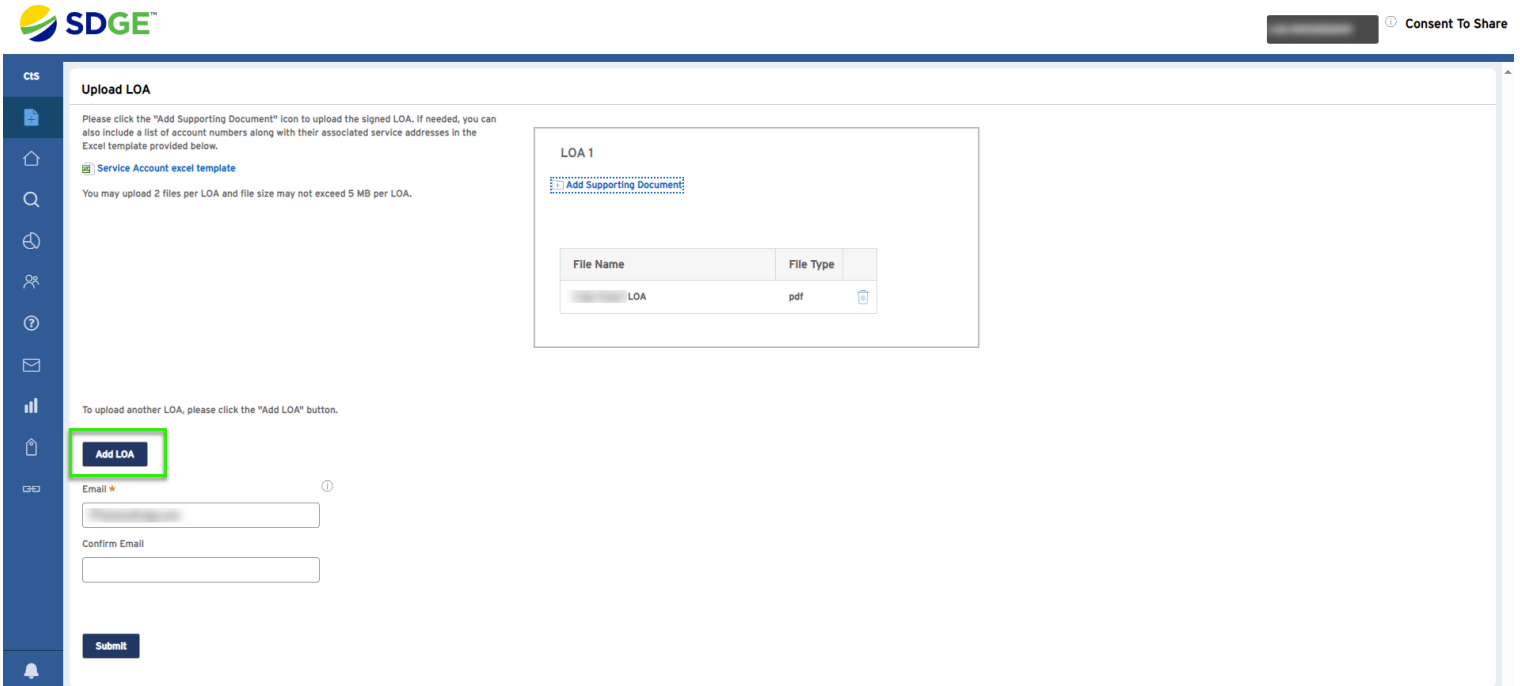
**Add LOA**

Email \*

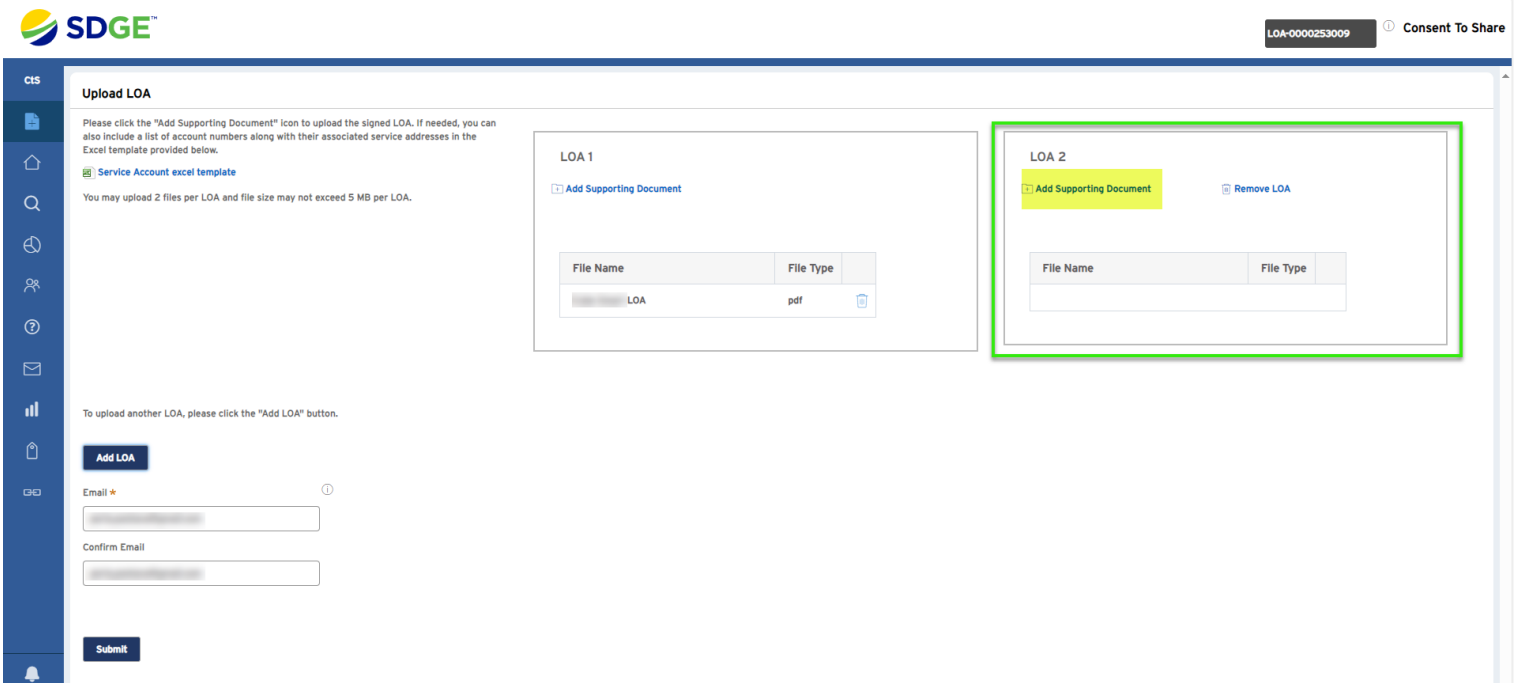
Confirm Email

**Submit**

11. Repeat **steps 7 thru 10** to add any supporting documents to the LOA.
12. If you'd like to upload another LOA for the same reason but for a different Third Party, click **'Add LOA.'**



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. Then click **'Submit'** when all documents are uploaded.

**Upload LOA**

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

[Service Account excel template](#)

You may upload 2 files per LOA and file size may not exceed 5 MB per LOA.

To upload another LOA, please click the "Add LOA" button.

**Add LOA**

Email \*

Confirm Email

**Submit**

**LOA 1**

[Add Supporting Document](#)

File Name	File Type	
LOA	pdf	

**LOA 2**

[Add Supporting Document](#) [Remove LOA](#)

File Name	File Type	
CISR	pdf	

15. A confirmation message will be displayed. **You have now completed the submission of your signed LOA.**

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.

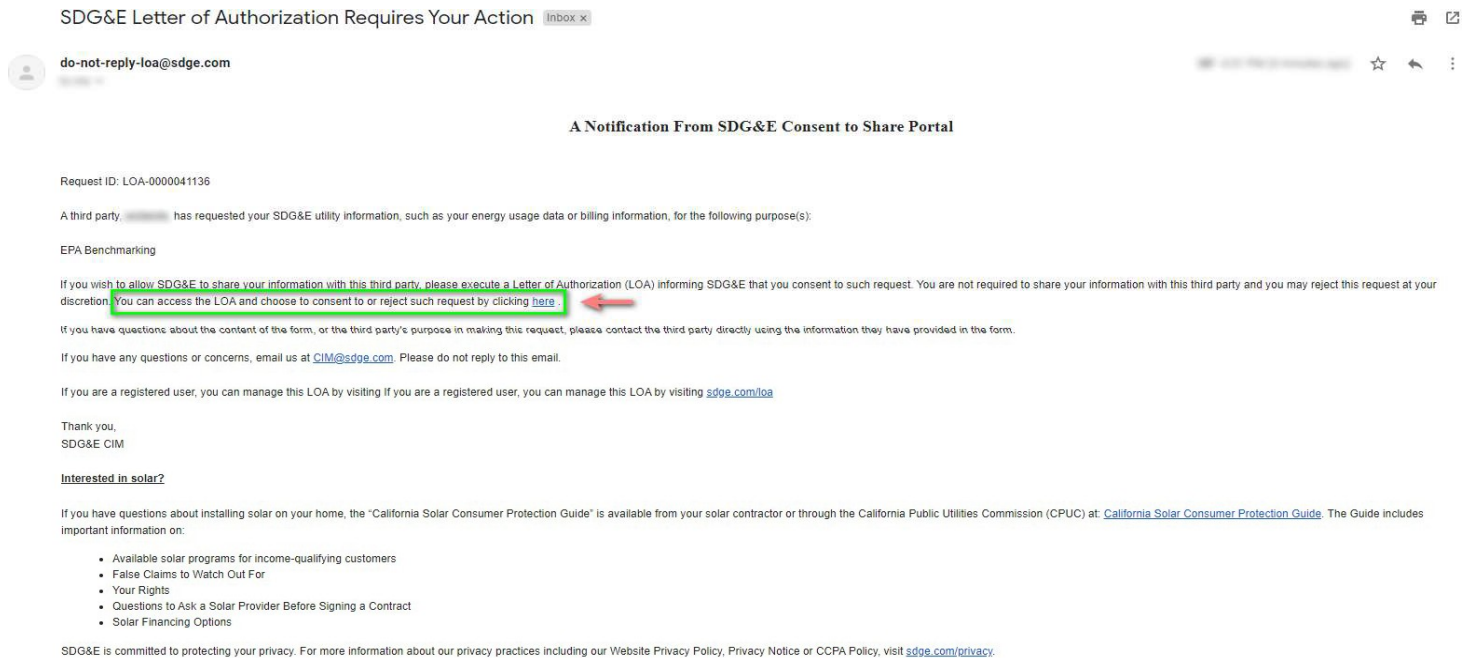
After validation by SDG&E, the LOA will be made active.

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

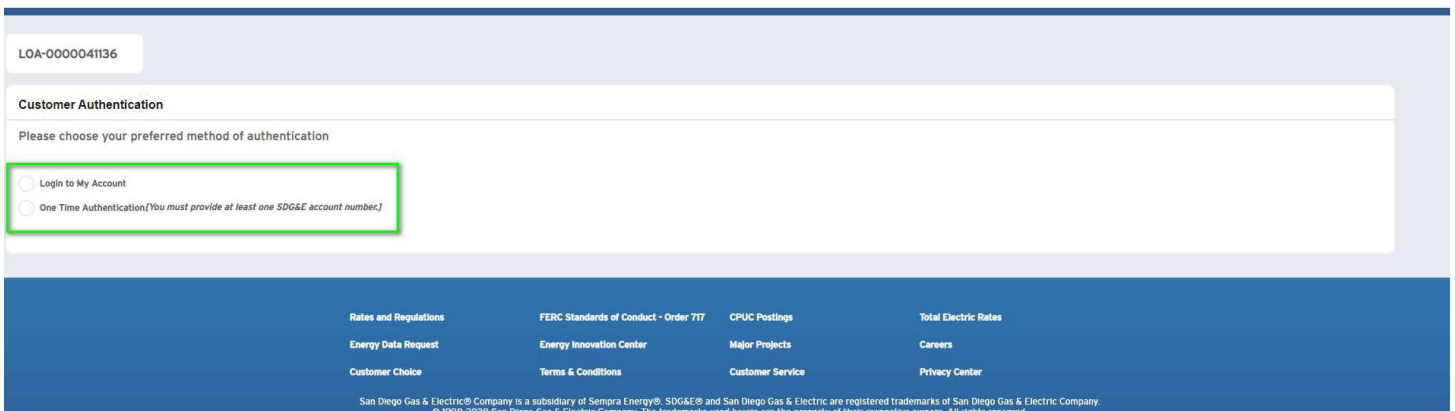
1. When a Third Party initiates an LOA, you will receive an email requesting you to review and sign the LOA.
2. There are 3 ways you can sign the LOA:
  - a. Clicking the email link
  - b. Logging into CtS
  - c. Printing the LOA and signing it

### Option A - clicking on the email link

1. Click on the link provided in the email.



2. Choose the method you'd like to authenticate yourself as an SDG&E customer.





3. If you choose, **‘Log into My Energy Center,’** you will be required to enter your SDG&E My Energy Center login credentials. Use this option **ONLY** if you are already a registered customer with us. Click **“Next”**

LOA-0000041136

**Customer Authentication**

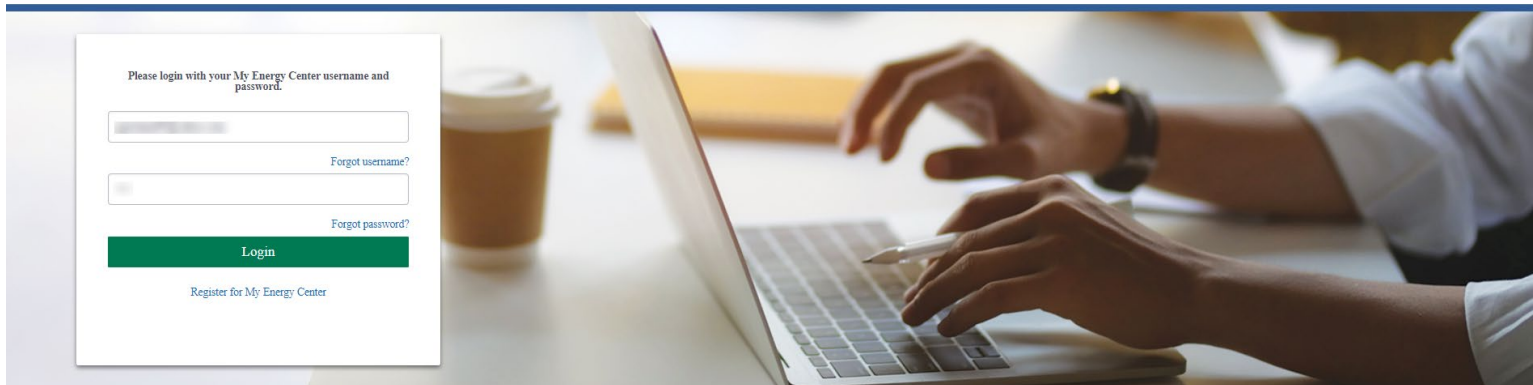
Please choose your preferred method of authentication

Login to My Account

One Time Authentication [You must provide at least one SDG&E account number.]

Cancel Next

In the subsequent screen, provide the credentials and click **‘Login.’**



4. If you choose **‘One Time Authentication’** you will be required to provide your details as shown in the screen. You will have 5 attempts to self-authenticate. If we are not able to authenticate you after 5 attempts, then you will be required to call SDG&E for authentication. Only after that, you may review to sign the LOA.

LOA-0000041137

**Customer Authentication**

Please choose your preferred method of authentication

Login to My Account

One Time Authentication [You must provide at least one SDG&E account number.]

**Your Information**

Help us find you by providing key account information

What Type of Account do you have? \*

Residential  Business

Type the characters you see in the picture below

rw h6 gn

Enter CAPTCHA

Cancel Next

LOA-0000041137

**Customer Authentication**

Please choose your preferred method of authentication

Login to My Account  
 One Time Authentication (You must provide at least one SDG&E account number.)

**Your Information**

Help us find you by providing key account information

What Type of Account do you have? \*

Residential  Business

First Name \*

Last Name \*

Bill Account Number \*

Search by: \*

Email  Phone  Last 4 digits of SSN

Primary Email Address \*

Type the characters you see in the picture below

fng2h2

Cancel Next

5. After authentication, the LOA will be displayed for you to review.
6. **Review/modify** the customer information.

Consent To Share

Contact & Service Account Info

LOA-0000254011 Print Filled LOA Print All Added Service Accounts Reject LOA

**Customer Contact Information**

Is this a Residential or Business Customer? \*

Residential  Business

<p>First Name *</p> <input type="text"/>	<p>Mailing Country *</p> <input type="text"/>
<p>Last Name *</p> <input type="text"/>	<p>Mailing Address *</p> <p>Please provide street number and street name</p> <input type="text"/>
<p>Email address *</p> <input type="text"/>	<p>Mailing City *</p> <p>Please provide the city</p> <input type="text"/>
<p>Confirm Email Address *</p> <input type="text"/>	<p>Mailing State / Province *</p> <input type="text" value="CA"/>
<p>Phone number *</p> <input type="text"/>	<p>Mailing Zip *</p> <p>Please provide the zip</p> <input type="text"/>
<p>Extension</p> <input type="text"/>	

Note: Customer's mailing address and email address must be unique and different from the Third Party.

Files & documents (1)

7. **Review/Add/Modify** service account information.

**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: 1

	Service Account Number*	Service Address*	Service City*
1	<input type="text"/>	<input type="text"/>	<input type="text"/>

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.

No file chosen

Click "Bulk Upload Service Accounts" to complete the upload process and to add the service account numbers to the LOA.

- You may view the Third-Party information. Make sure that you recognize the Third Party before providing the authorization.

**Primary Third Party / DRP Contact Information**

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

- Click 'Next' in the subsequent screen and provide your initials in the highlighted boxes. These options were identified by your Third Party to provide the signature. You may initial any boxes per your discretion.

Contact & Service Account Info    Customer Actions Authorized

LOA-000025401    [Print Filled LOA](#)    [Print All Added Service Accounts](#)    [Reject LOA](#)

**Files & documents (1)**

LOA-000025401\_CorwinD...  
Corwin Delight • 6/6/24 3:05 PM • LOAForm - Public

### Customer Actions Authorized

Corwin Delight has requested for you to initial the boxes highlighted in yellow.

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 (Corwin Delight) authorize my Agent to act on my behalf to perform the following specific acts and actions (initial all applicable boxes but at least one MUST be initialed): \*

1. Request and receive billing records history and all meter usage data used for bill calculation for all of my account(s), as specified herein, regarding utility services furnished by the Utility
2. EPA Benchmarking (authorizes usage information to be uploaded to the EPA's ENERGY STAR Portfolio Manager®)
3. Request and receive copies of correspondence with my account(s) concerning (initial all that apply)
  - 3a. Verification of rate, date of rate change, and related information
  - 3b. Contracts and Service Agreements
  - 3c. Previous or proposed issuance of adjustments/credits
  - 3d. Other previously issued or unresolved/disputed billing adjustments.
4. Request investigation of my utility bill(s)
5. Request special metering, and the right to access interval usage and other metering data on my account(s)
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)  
Online access to MyAccount

I (Corwin Delight) authorize the release of my account information and authorize my agent to act on my behalf on the following basis (initial one box only):

One time authorization only

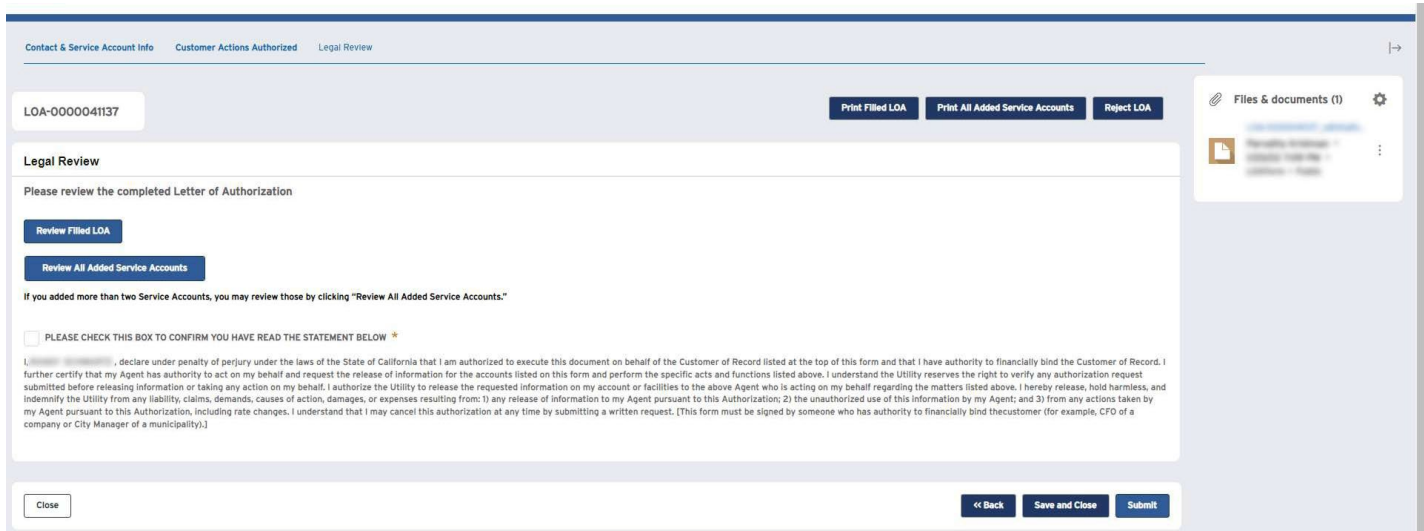
One year authorization

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

Please check here if you would like to select a timeframe for the data being shared. By default SDGE will send the last 12 months of data to the Third Party unless a specific range is required, or unless you tell us otherwise.

[Continue Offline \(Paper\)](#)    [Save and Close](#)    [Continue Online \(Electronic\)](#)

10. In the next screen, review the LOA and select the checkbox for acknowledgment.



Contact & Service Account Info Customer Actions Authorized Legal Review

LOA-0000041137

Print Filled LOA Print All Added Service Accounts Reject LOA

### Legal Review

Please review the completed Letter of Authorization

Review Filled LOA

Review All Added Service Accounts

If you added more than two Service Accounts, you may review those by clicking "Review All Added Service Accounts."

PLEASE CHECK THIS BOX TO CONFIRM YOU HAVE READ THE STATEMENT BELOW \*

I, \_\_\_\_\_, 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.)]

Close < Back Save and Close Submit

11. In the next screen, you will be asked to provide your signature and complete the Captcha.

LOA-000041137

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

Files & documents (1)

### Customer Contact Information

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

### Service Address Information

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

### Primary Third Party/DRP Contact Information

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

### Customer Actions 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 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 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 authorize the release of my account information and authorize my agent to act on my behalf on the following basis (initial one box only):

- One time authorization only
- One year authorization

Requests for information and/or for the acts and functions specified above will be accepted and processed each time requested within the twelve month period from the date of execution of this Authorization.

Beginning on the date this LOA commences and ending on:

Authorization is given for the period commencing with date of execution until:

### Electronic Signature

I, \_\_\_\_\_, 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).]

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

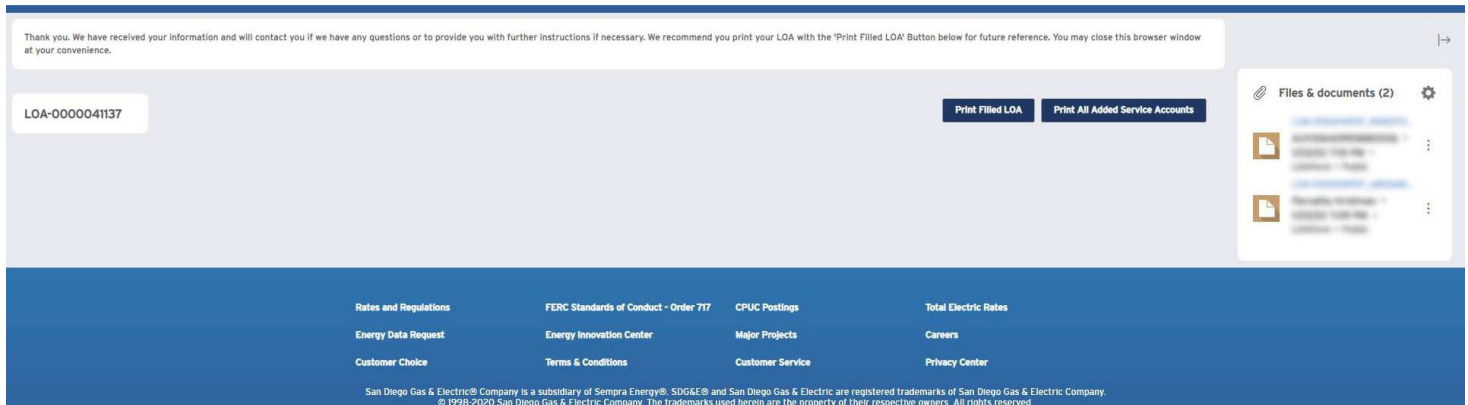
Would you like to make a data request or include special instructions with this LOA?

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

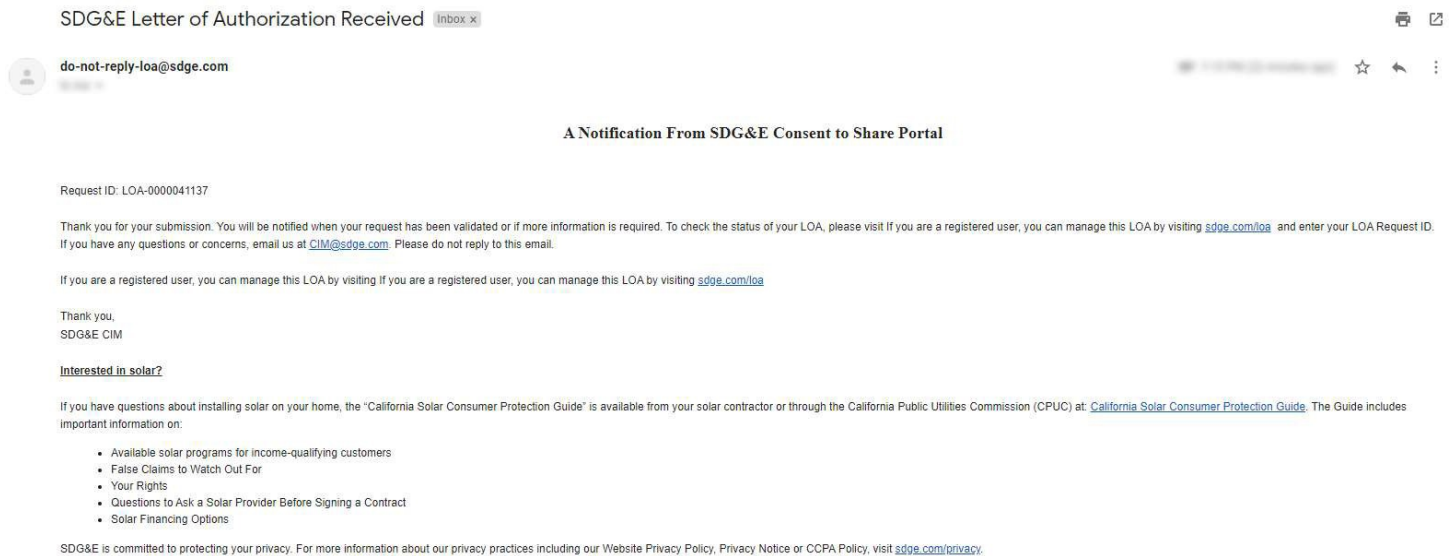
Type the characters you see in the picture below

5kfrf6

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



13. You will receive an email confirming the LOA. The Third Party will also be notified via email.



14. Any time during the above signing process, you may also choose to reject the LOA by clicking ‘**Reject LOA**’ at the top of the screen.

LOA-0000041138

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 \*

Confirm Email Address \*   Mailing State / Province \*

Phone number \*   Extension   Mailing Zip \*

**Service Address Information**

Click "Add account number" to add Service Account Numbers to this LOA. Your service account number can be found on your bill. \*

+ Add account number   Row Count: 1

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

Click 'Yes' in the confirmation pop-up.

LOA-0000041138

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 \*

Confirm Email Address \*   Mailing State / Province \*

Phone number \*   Extension   Mailing Zip \*

**Service Address Information**

Click "Add account number" to add Service Account Numbers to this LOA. Your service account number can be found on your bill. \*

+ Add account number   Row Count: 1

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

**LOA Rejection Confirmation**

Are you sure you want to reject this LOA request?

A confirmation message will be displayed.



Contact & Service Account Info

LOA-000041138 Print Filled LOA Print All Added Service Accounts Reject LOA

**Customer Contact Information**

Is this a Residential or Business Customer? \*

Residential  Business

First Name \*

Last Name \*

Email address \*

Confirm Email Address \*

Phone number \*  Extension  Mailing Zip \*

**LOA Rejection Confirmation**

Thank you. This LOA is now rejected and all necessary parties will be notified. You may close this popup at your convenience.

OK

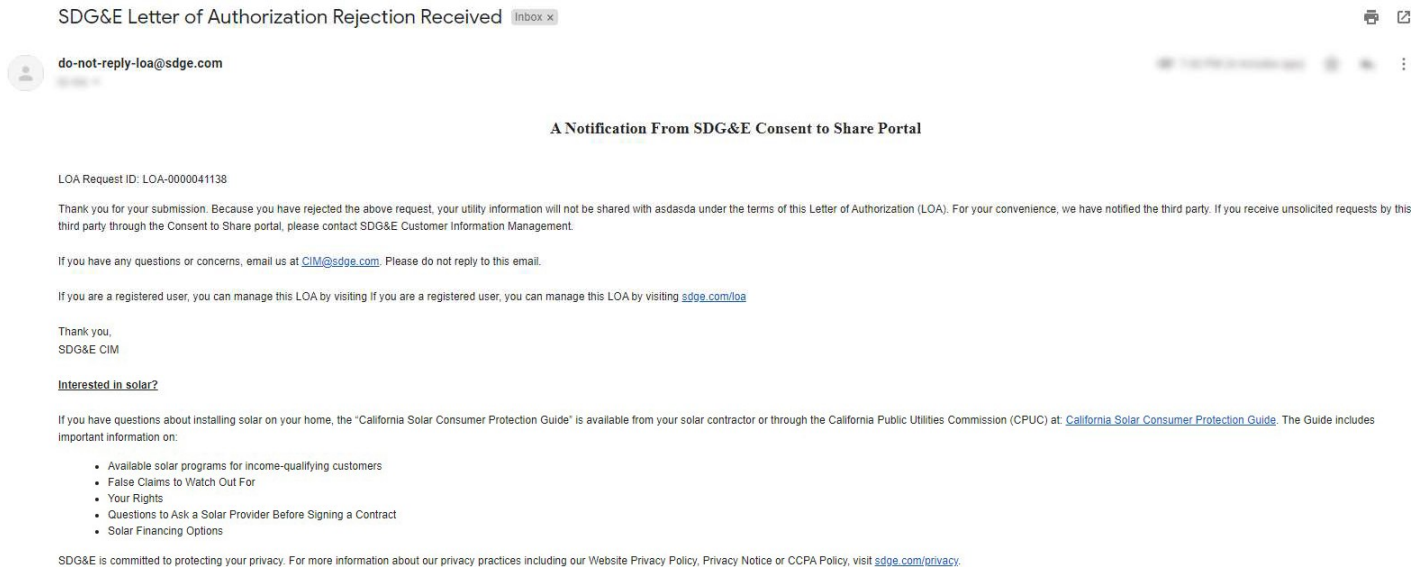
**Service Address Information**

Click "Add account number" to add Service Account Numbers to this LOA. Your service account number can be found on your bill. \*

+ Add account number Row Count: 1

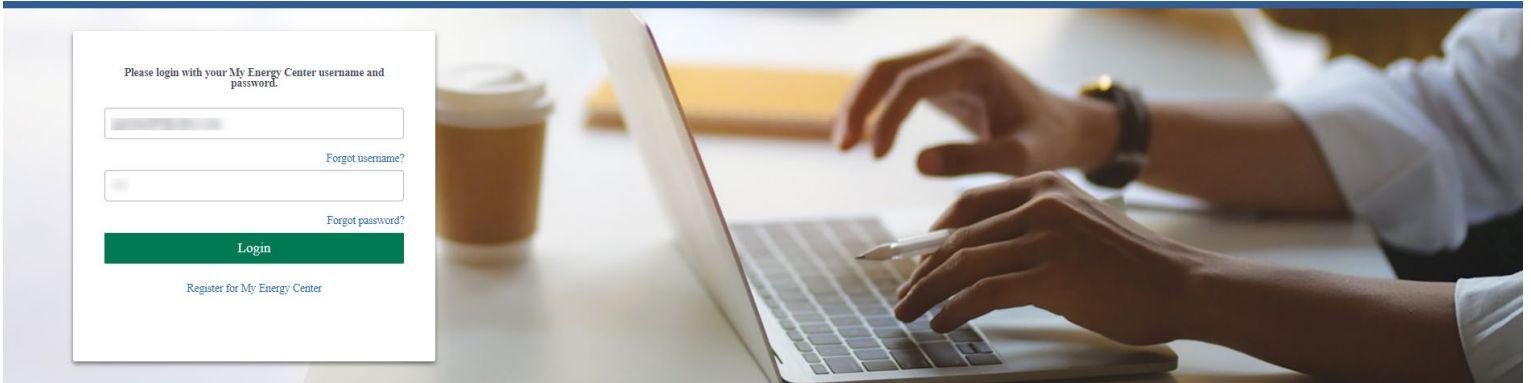
Service Account Number*	Service Address*	Service City*

You have now successfully **rejected the LOA**. You will receive an email confirming the rejection. The Third Party will also be notified.



Option B - logging into CTS

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



3. Locate the LOA from the **'My Open LOAs'** tab. The status of the LOAs that require your signature will say **'Pending Customer Signature.'**

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-0000040166	Pending-Customer Signature	Standard CISR	EPA Benchmarking	Electronic							
<input type="checkbox"/>	LOA-0000041133	Pending-Third Party Signature	CISR-DRP	Third Party Demand Response Program	Electronic							
<input type="checkbox"/>	LOA-0000040158	Pending-Third Party Signature	Standard CISR	EPA Benchmarking	Electronic							

4. Open the LOA and review the details.

CIS

LOA-0000040166

LOA Actions

Purpose: EPA Benchmarking

Start Date: --

End Date: --

Status: PENDING-CUSTOMER SIGNATURE

Created: --

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 \*

Email address \*  Mailing City \*

Confirm Email Address \*  Mailing State / Province \*

Phone number \*  Extension  Mailing Zip \*

### Service Address Information

Click "Add account number" to add Service Account Numbers to this LOA. Your service account number can be found on your bill. \*

+ Add account number Row Count: 1

Service Account Number*	Service Address*	Service City*
<input type="text"/>	<input type="text"/>	<input type="text"/>

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.

No file chosen

Click "Upload Service Accounts" to complete the upload process and to add the service account numbers to the LOA.

### Primary Third Party / DRP Contact Information

Organization Name  Mailing Country

First Name  Mailing Address

Last Name  Mailing City

Email address  Mailing State / Province

Phone number  Extension  Mailing Zip

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

5. Click 'Next' and provide the authorizations in the next screen.

**Customer Actions Authorized**

Parvathy Krishnan has requested for you to initial the boxes highlighted in yellow.

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, \_\_\_\_\_ 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 bills(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

One year authorization

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

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

Navigation: Close, << Back, Save and Close, Next

6. Review the LOA in the next screen.

**Legal Review**

Please review the completed Letter of Authorization

Review Filled LOA

Review All Added Service Accounts

If you added more than two Service Accounts, you may review those by clicking "Review All Added Service Accounts."

PLEASE CHECK THIS BOX TO CONFIRM YOU HAVE READ THE STATEMENT BELOW \*

I, \_\_\_\_\_, 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).]

Navigation: Close, << Back, Save and Close, Submit

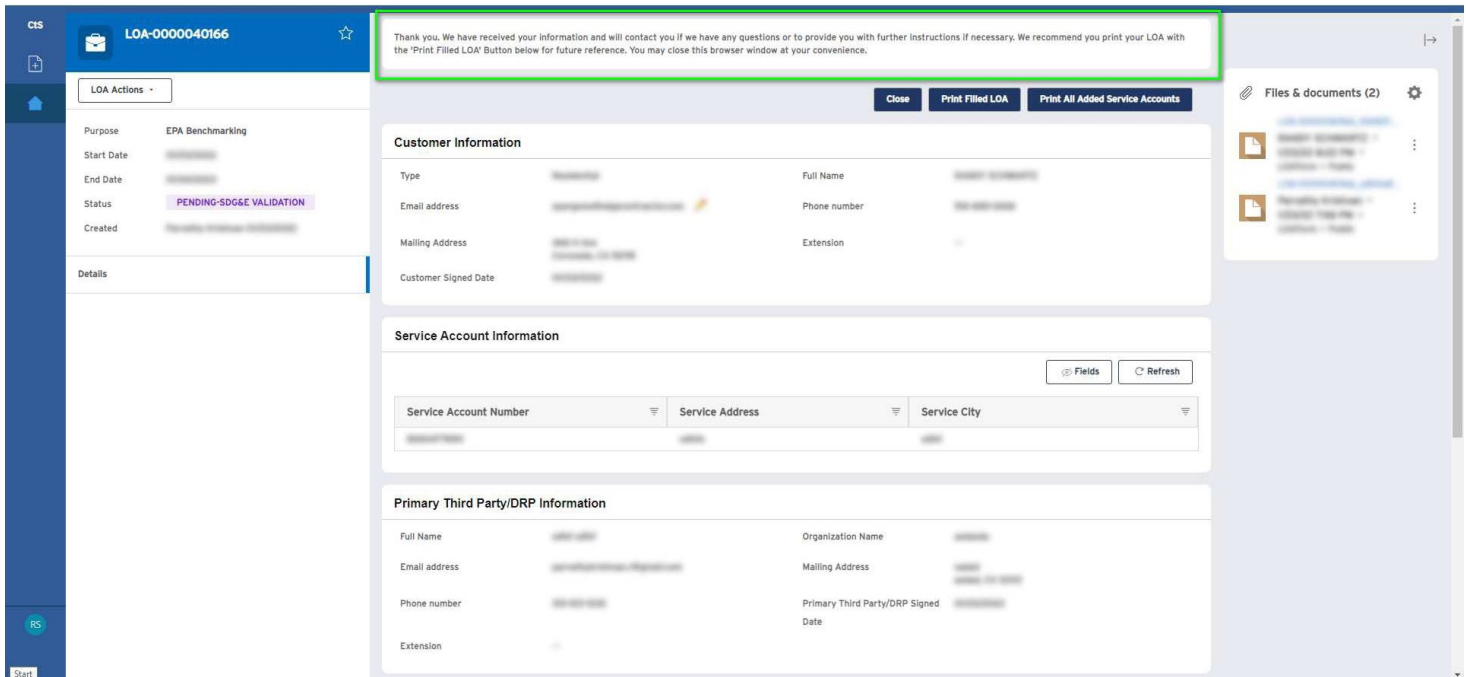
### 7. Provide your signature in the next screen.

The screenshot displays a web-based form for a Letter of Authorization (LOA) with the ID LOA-000040166. The form is divided into several sections:

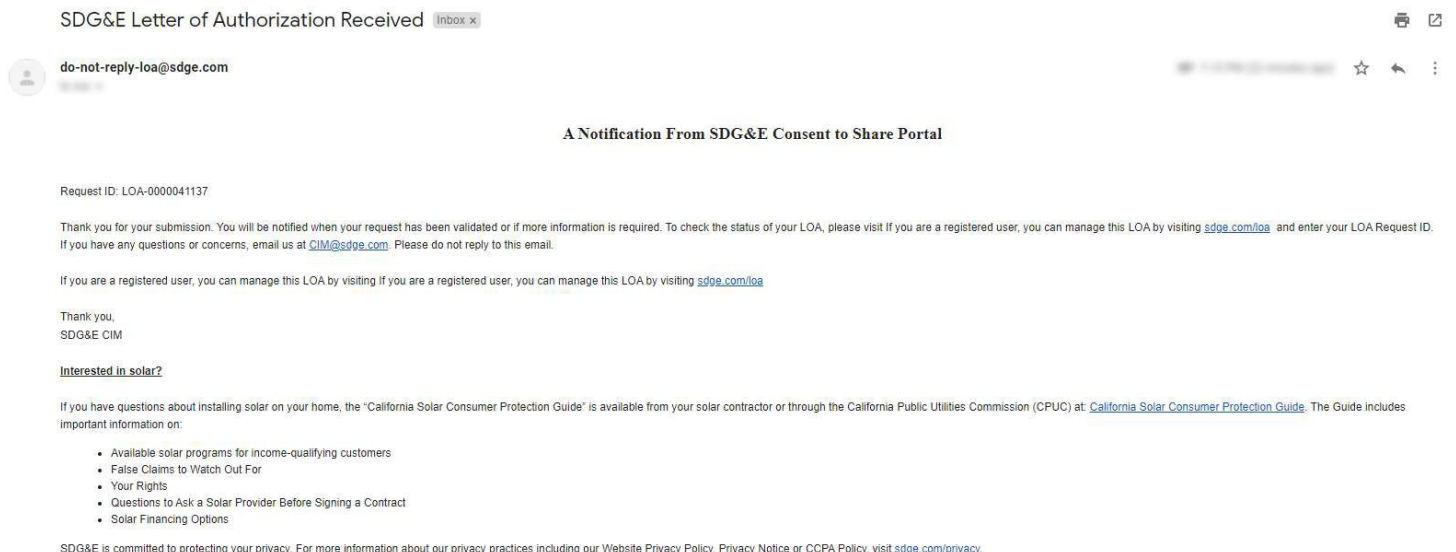
- Customer Contact Information:** Fields for Type, Full Name, Email address, Mailing Address, Phone number, Extension, and Customer Signed Date.
- Service Address Information:** Fields for Service Account Number, Service Address, and Service City.
- Primary Third Party/DRP Contact Information:** Fields for Full Name, Email address, Mailing Address, Organization Name, Phone number, Extension, and Primary Third Party/DRP Signed Date.
- Customer Actions Authorized:** A section with a disclaimer and a list of 9 actions. Each action has a radio button for selection. Action 2 (EPA Benchmarking) and Action 4 (Request investigation of my utility bill(s)) are selected with 'RP' (Requester's Print Name).
- Electronic Signature:** A section with a disclaimer and a large text area for the signature. Below it, a question asks if the user wants to make a data request or include special instructions. The 'No, data will be requested later.' option is selected.

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

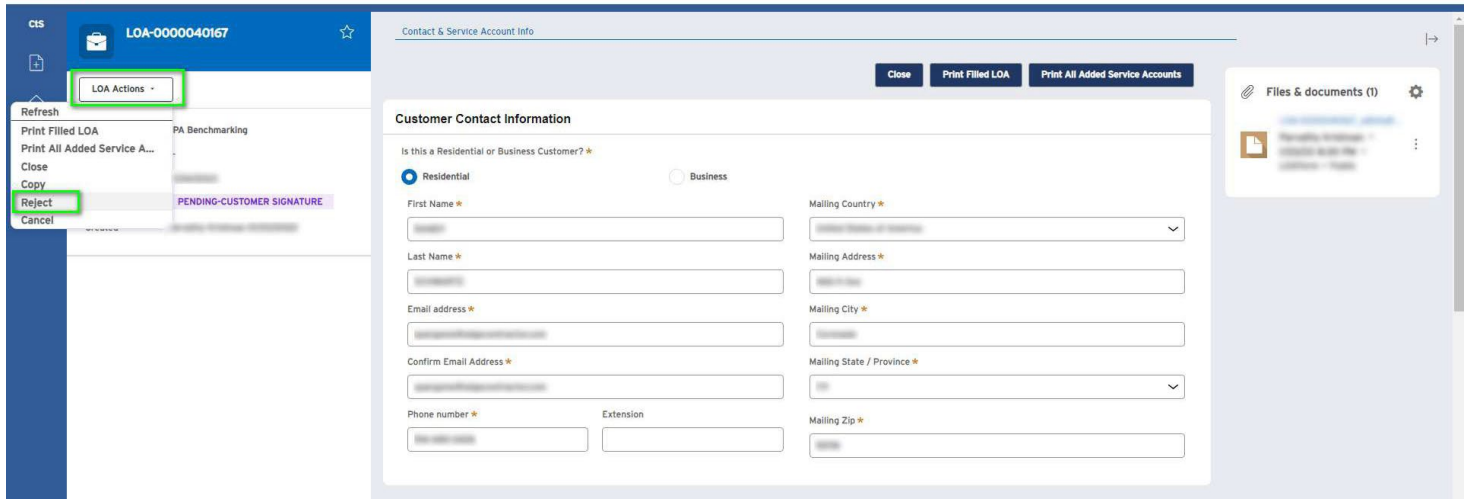
8. Once you click ‘**Complete Review**,’ the LOA will be submitted for SDG&E validation. **You have now completed the LOA signing process.**



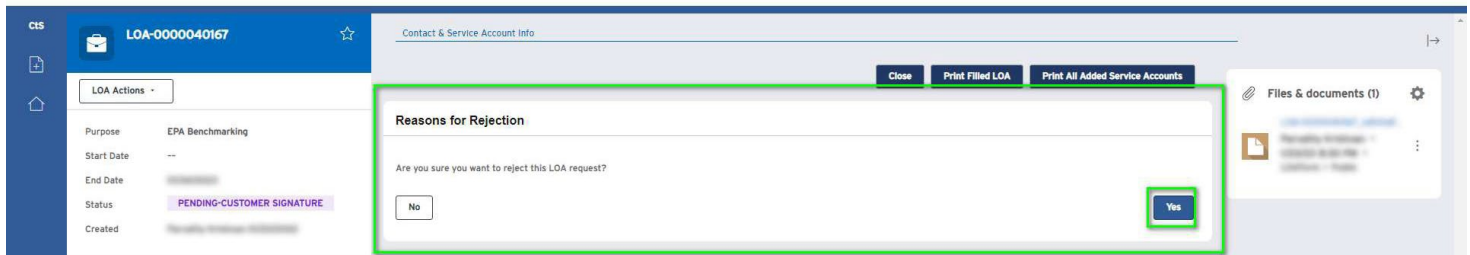
9. You will receive an email confirming the LOA. The Third Party will also be notified via email.



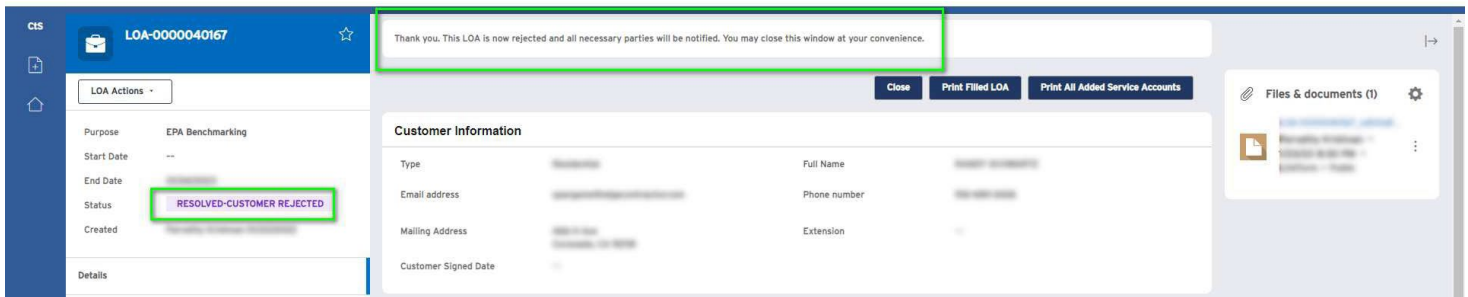
10. Any time during the above signing process, you may also choose to reject the LOA by clicking on ‘**Reject LOA**’ from LOA Actions menu.



Click 'Yes' in the confirmation screen.



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-000041138

Thank you for your submission. Because you have rejected the above request, your utility information will not be shared with asdasda under the terms of this Letter of Authorization (LOA). For your convenience, we have notified the third party. If you receive unsolicited requests by this third party through the Consent to Share portal, please contact SDG&E Customer Information Management.

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:

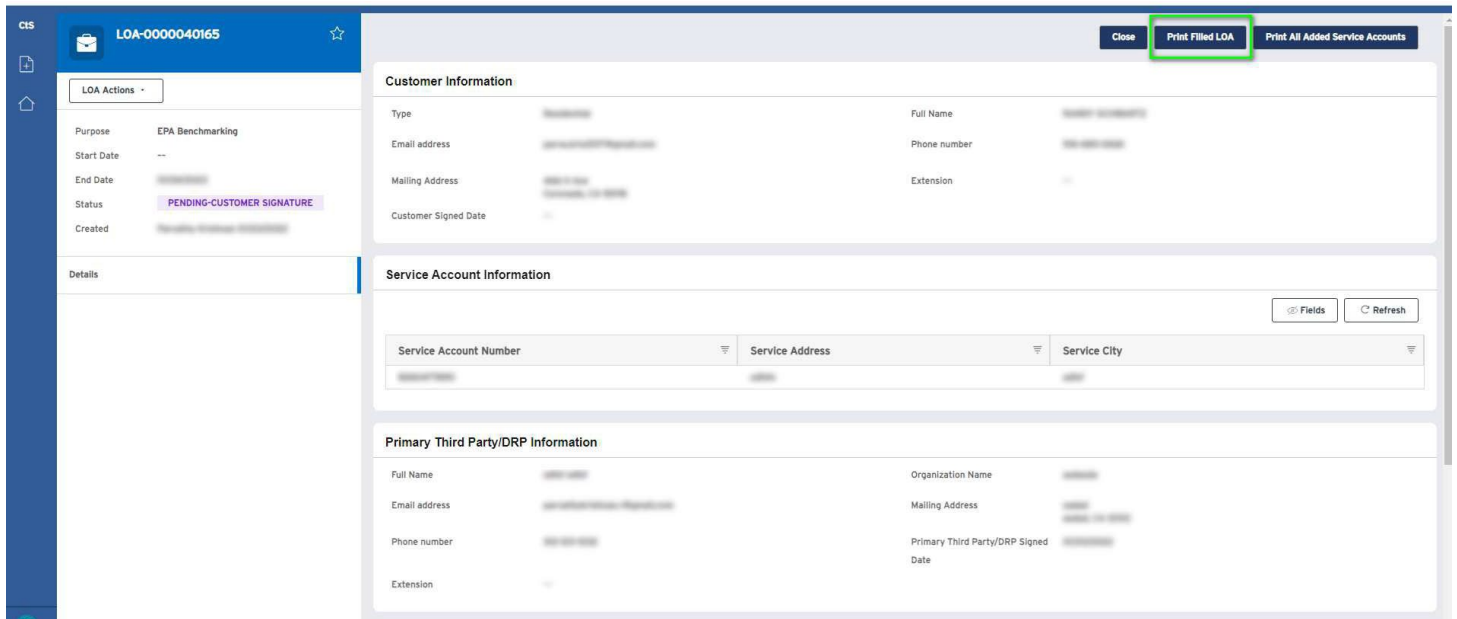
- Available solar programs for income-qualifying customers
- False Claims to Watch Out For
- Your Rights
- Questions to Ask a Solar Provider Before Signing a Contract
- Solar Financing Options

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 - printing the LOA and signing 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 into CtS or access the LOA thru the link provided in the email.

1. Once you access the LOA, select **'Print Filled LOA.'**





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

**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 OF CUSTOMER OF RECORD \_\_\_\_\_  
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 _____	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) \_\_\_\_\_

<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).]

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

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

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

3. After the LOA is completed and signed, save the LOA as a PDF document and upload the LOA.

## How to revoke an active authorization

When 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 ways to revoke an LOA:

- a) Revoke the LOA by yourself.
- b) Call SDG&E and request the revocation.

### Revoking the LOA by yourself

1. Log into CtS and open the **'Active'** LOA that you wish to revoke. You can open the LOA by double-clicking on the LOA ID.

The screenshot shows the 'My Active LOAs' section of the CtS interface. It features a table with the following 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 in the table:

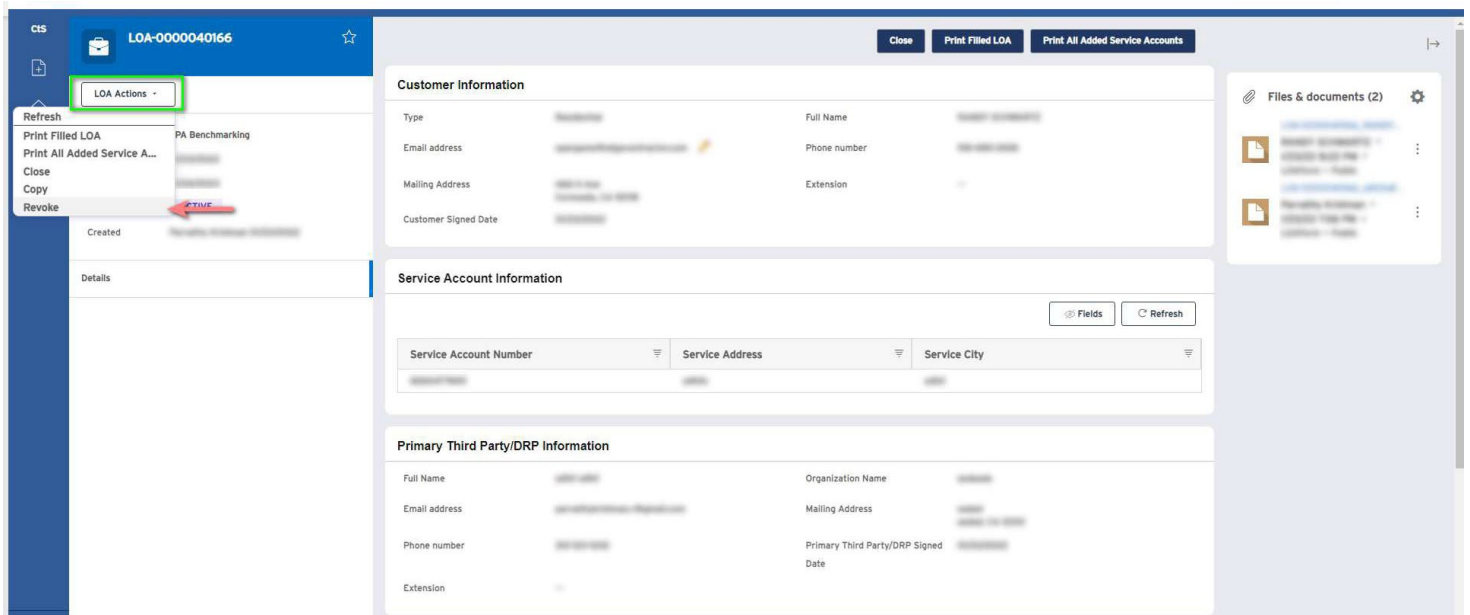
Select	LOA ID	LOA Status	LOA Type	Purpose	Submission Process	LOA Create Date	Start Date	End Date	Primary Third Party/DRP First Name	Primary Third Party/DRP Last Name	Secondary Third Party/DRP First Name	Secondary Third Party/DRP Last Name
<input type="checkbox"/>	LOA-0000040165	Pending-Customer Signature	Standard CISR	EPA Benchmarking	Electronic							
<input type="checkbox"/>	LOA-0000041133	Pending-Third Party Signature	CISR-DRP	Third Party Demand Response Program	Electronic							

Below the table are buttons for 'Cancel LOAs', 'Reject LOA', and 'Update Email'. The 'My Active LOAs' section is highlighted with a green box in the image. Below it, another table shows active LOAs:

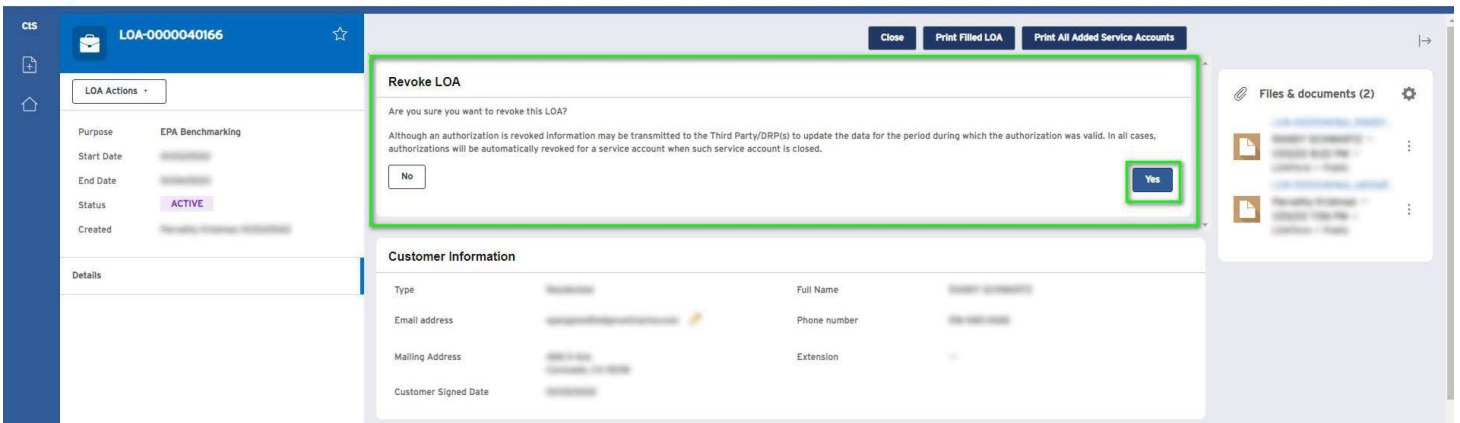
Select	LOA ID	LOA Status	LOA Type	Purpose	Submission Process	LOA Create Date	Start Date	End Date	Primary Third Party/DRP First Name	Primary Third Party/DRP Last Name	Secondary Third Party/DRP First Name	Secondary Third Party/DRP Last Name
<input type="checkbox"/>	LOA-0000040166	Active	Standard CISR	EPA Benchmarking	Electronic							
<input type="checkbox"/>	LOA-0000041135	Active	Non Standard	EPA Benchmarking	Electronic							

Below this table is an 'Update Email' button. At the bottom of the interface, the 'My Closed LOAs' section is visible with a 'Refresh' button.

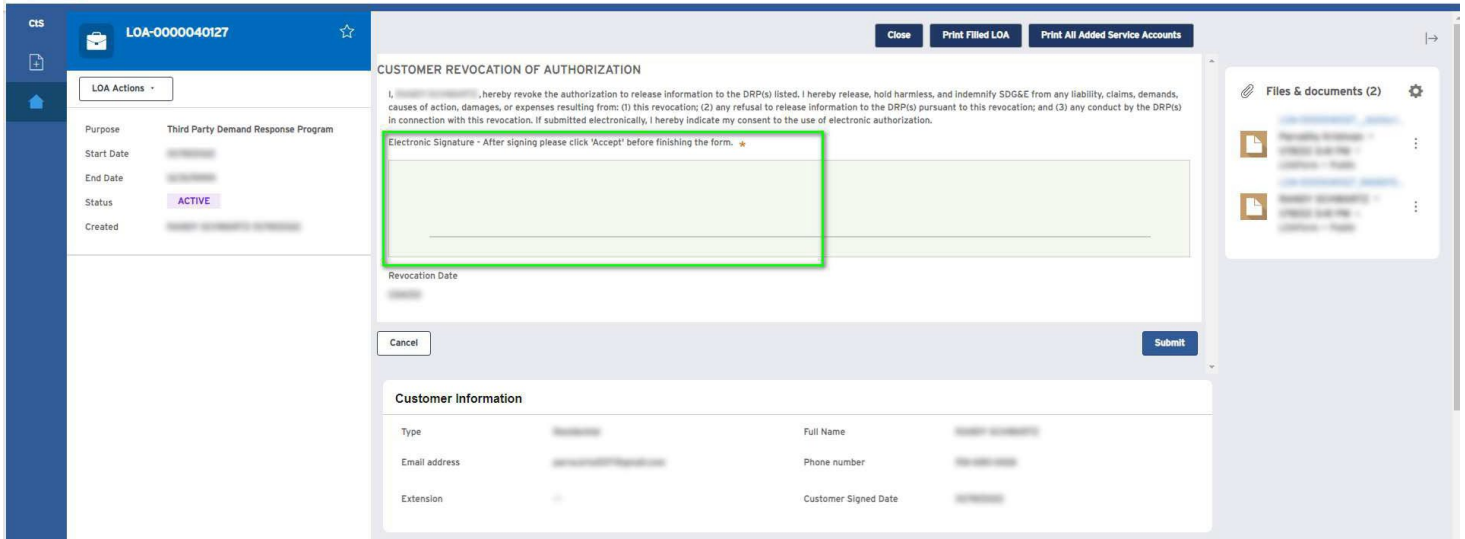
2. Click on **'LOA Actions'** and choose **'Revoke.'**



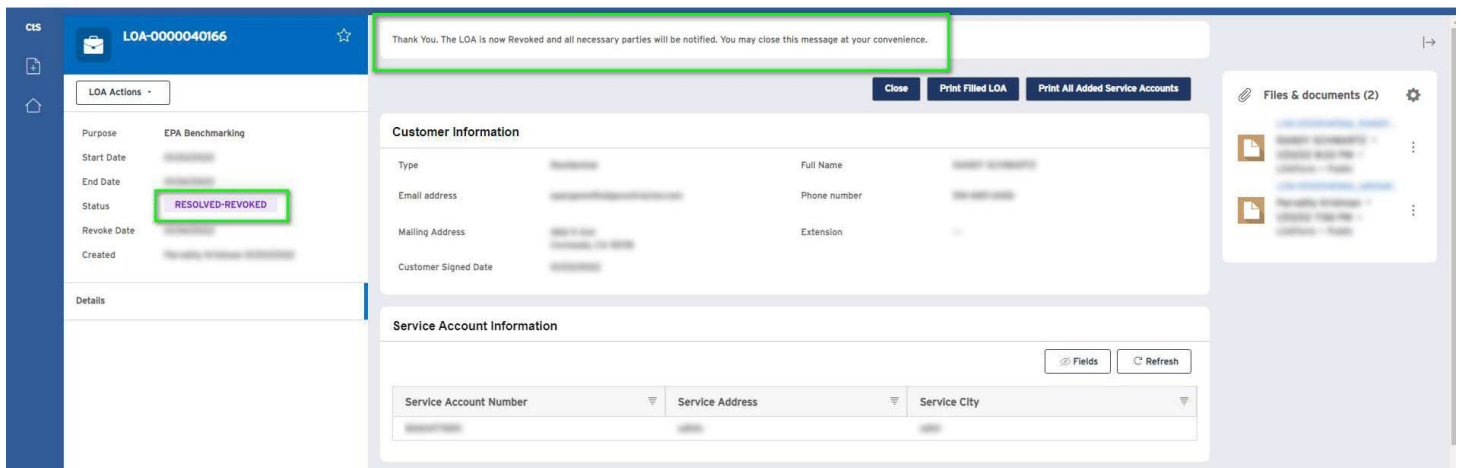
3. In the confirmation screen, choose 'Yes.'



4. When you click 'yes,' the LOA will be revoked. Depending on the type of LOA, you may be asked to provide your signature. If the LOA you are revoking was created for a **Third Party Demand Response Program**, you will need to provide the signature to complete the revocation.



5. A confirmation message will be displayed.



You will receive an email confirming the revocation. The Third Party 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-000040127

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

To submit a new request, please visit if you are a registered user, you can manage this LOA by visiting [sdge.com/loa](https://sdge.com/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:

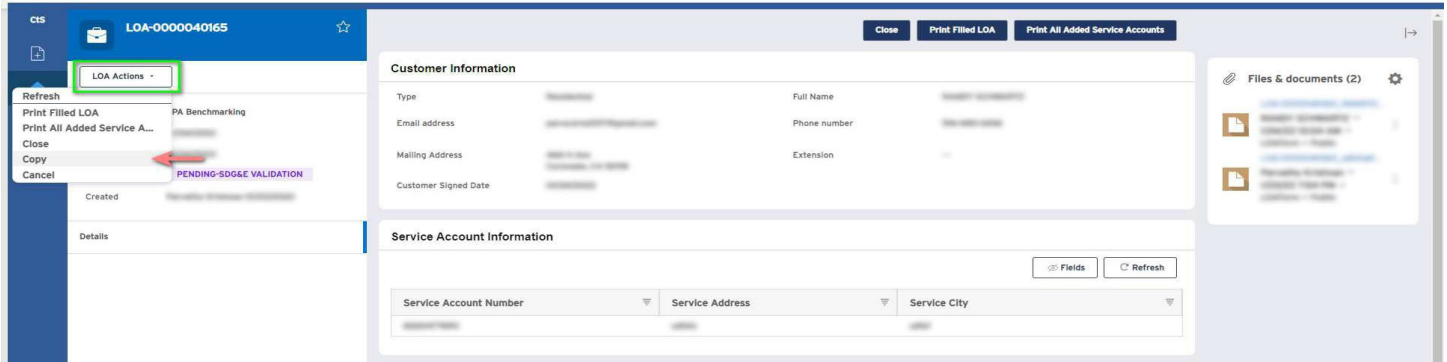
- Available solar programs for income-qualifying customers
- False Claims to Watch Out For
- Your Rights
- Questions to Ask a Solar Provider Before Signing a Contract
- Solar Financing Options

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).

## How to copy an existing LOA and create a new one

You may copy any of your existing LOAs to create new ones. 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 into 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 the information from the source LOA will be copied automatically to the new one. Review these details thoroughly and make any required updates. Then click on **'Next'**.

Contact & Service Account Info

Close

### Customer Contact Information

Is this a Residential or Business Customer \*

Residential  Business

First Name	Mailing Country	
<input type="text"/>	<input type="text"/>	
Last Name	Mailing Address	
<input type="text"/>	<input type="text"/>	
Date Customer Signed *	Mailing City	
<input type="text"/>	<input type="text"/>	
Organization Name *	Mailing State / Province	
<input type="text"/>	<input type="text"/>	
Title	Mailing Zip	
<input type="text"/>	<input type="text"/>	
Phone number	Extension	Email address
<input type="text"/>	<input type="text"/>	<input type="text"/>
Confirm Email Address		
<input type="text"/>		

Files & documents (0)

No items

Tags (0)

No items

### 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: 1

	Service Account Number*	Service Address*	Service City*
1	<input type="text"/>	<input type="text"/>	<input type="text"/>

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.

No file chosen

Click "Bulk Upload Service Accounts" to complete the upload process and to add the service account numbers to the LOA.

### Primary Third Party / DRP Contact Information

Organization Name	Mailing Country	
<input type="text"/>	<input type="text" value="United States of America"/>	
First Name *	Mailing Address	
<input type="text"/>	<input type="text"/>	
Last Name *	Mailing City	
<input type="text"/>	<input type="text"/>	
Date Third Party Signed *	Mailing State / Province	
<input type="text"/>	<input type="text"/>	
Phone number	Extension	Mailing Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email address		
<input type="text"/>		
Confirm Email Address		
<input type="text"/>		

The Utility will provide the information requested above, to the extent available, via any one of the following channels. My (Agent) preferred format is: \*

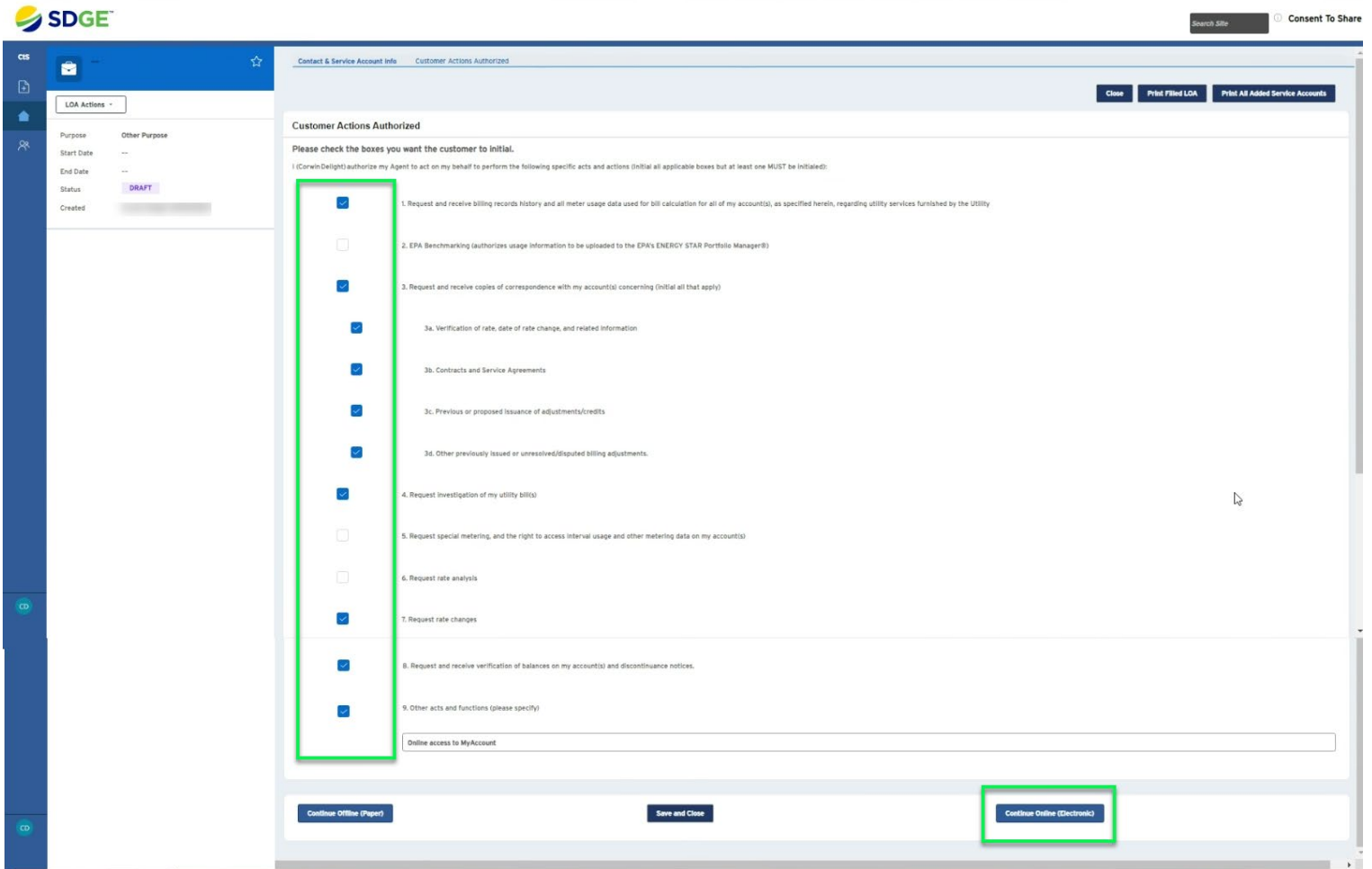
- Hard copy via US Mail (if applicable)
- Electronic format via electronic mail (if applicable) to this e-mail address:

Email address \*

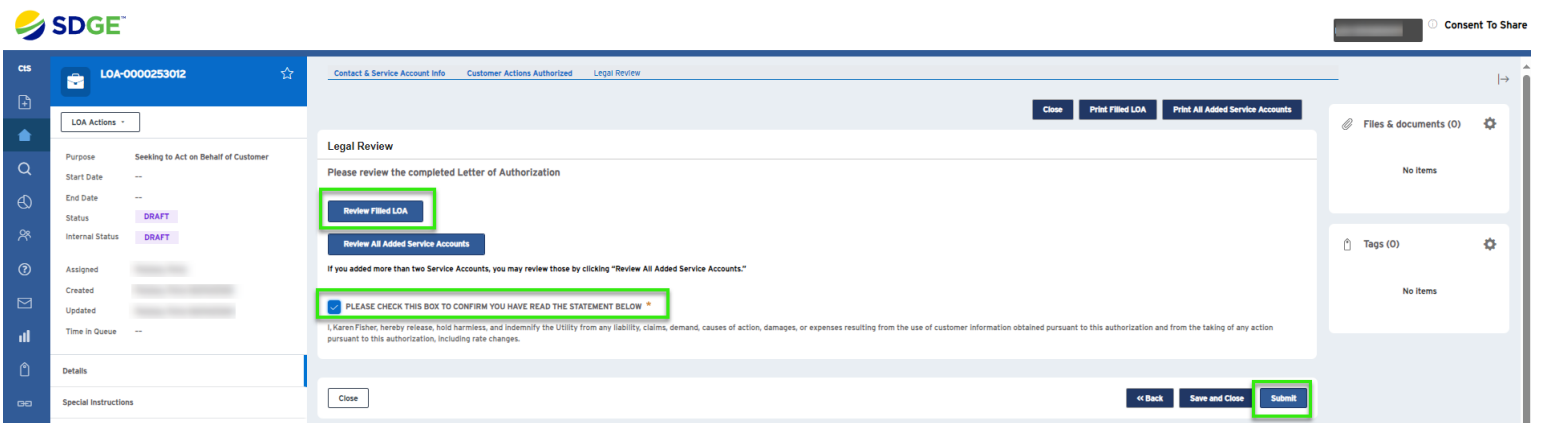
Re-Enter Email Address \*

Facsimile at this telephone number:

4. Initial the authorizations and click on 'Continue Online'.



5. Review the new LOA. Check box confirming you have read the legal statement. Then click 'Submit' button.



6. Sign the LOA and click 'Accept.' In this same section, select from the optional radio buttons to indicate if you would like to make a data request or add special instructions. Then click 'Complete Review'.



LOA-0000253012

Purpose: Seeking to Act on Behalf of Customer

Status: DRAFT

Internal Status: DRAFT

Assigned: [Redacted]

Created: [Redacted]

Updated: [Redacted]

Time in Queue: --

Details

Special Instructions

Case Log

Comments

Data Disclosure Information

Notification Log

8. Request and receive verification of balances on my account(s) and discontinuance notices.

9. Other acts and functions (please specify)

**Electronic Signature**

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

I, Karen Fisher, 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.

[Signature]

Accept Clear

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

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

Close Back Save and Close Complete Review

7. A confirmation message will be displayed.

LOA-0000040173

Purpose: EPA Benchmarking

Status: PENDING-THIRD PARTY SIGNATURE

Details

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	Residential	Full Name	Karen Fisher
Email address	karen.fisher@sdge.com	Phone number	951-555-1234
Mailing Address	123 Main St San Diego, CA 92101	Extension	
Customer Signed Date	[Redacted]		

**Service Account Information**

Fields Refresh

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

Files & documents (1)

You will receive an email confirming the LOA.

SDG&E Letter of Authorization Received Inbox x



do-not-reply-loa@sdge.com



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

Request ID: LOA-0000040165

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](#). If you are a registered user, you can manage this LOA by visiting [sdge.com/loa](#) and enter your LOA Request ID. If you have any questions or concerns, email us at [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](#). If you are a registered user, you can manage this LOA by visiting [sdge.com/loa](#).

Thank you,  
SDG&E CIM

**Interested in solar?**

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- 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 cancel a request before it's active

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

There are 2 ways to cancel an LOA:

- a) Cancel the LOA by yourself.
- b) Email [cim@sdge.com](mailto:cim@sdge.com) and request the revocation.

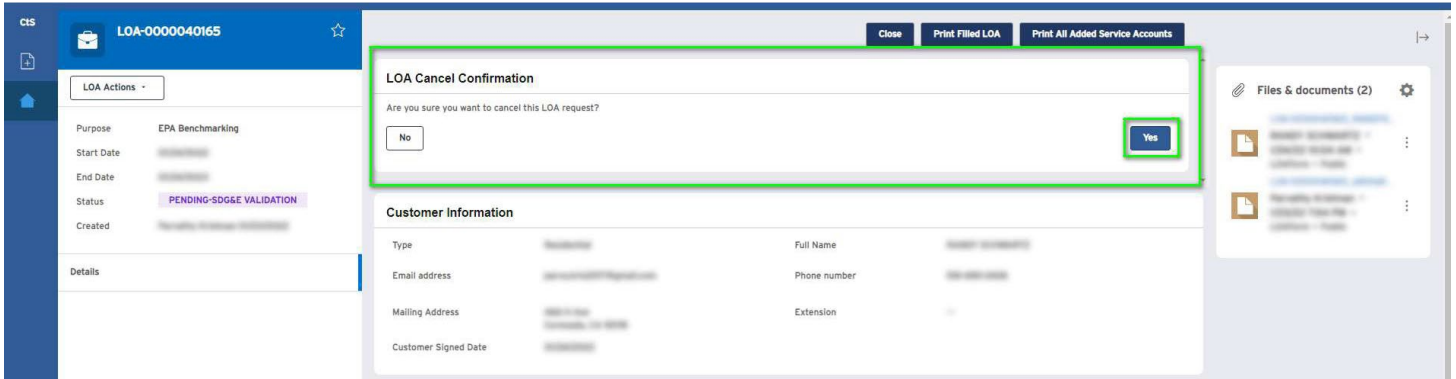
### Canceling the LOA by yourself

1. Log into 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. Double click on the LOA ID to access the LOA.

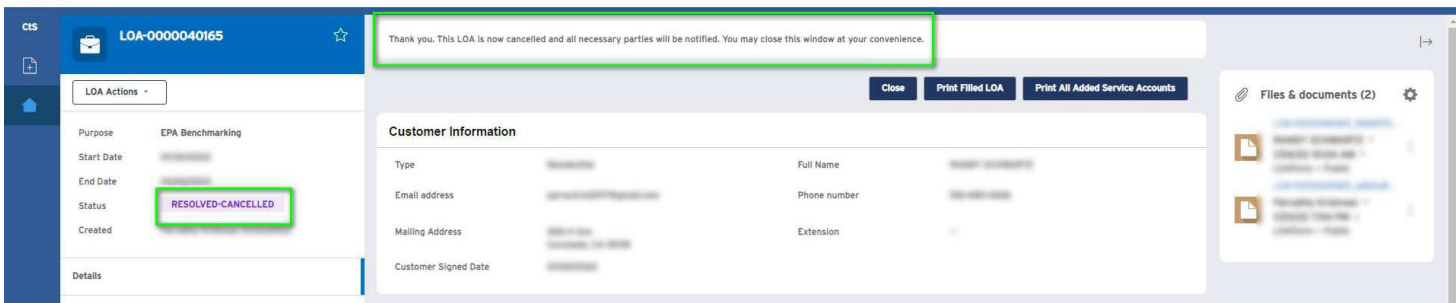
Select	LOA ID	LOA Status	LOA Type	Purpose	Submission Process	LOA Create Date	Start Date	End Date	Primary Third Party/DRP First Name	Primary Third Party/DRP Last Name	Secondary Third Party/DRP First Name	Secondary Third Party/DRP Last Name
<input type="checkbox"/>	LOA-000040166	Pending-Customer Signature	Standard CISR	EPA Benchmarking	Electronic							
<input type="checkbox"/>	LOA-000040133	Pending-Third Party Signature	CISR-DRP	Third Party Demand Response Program	Electronic							
<input type="checkbox"/>	LOA-000040158	Pending-Third Party Signature	Standard CISR	EPA Benchmarking	Electronic							

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

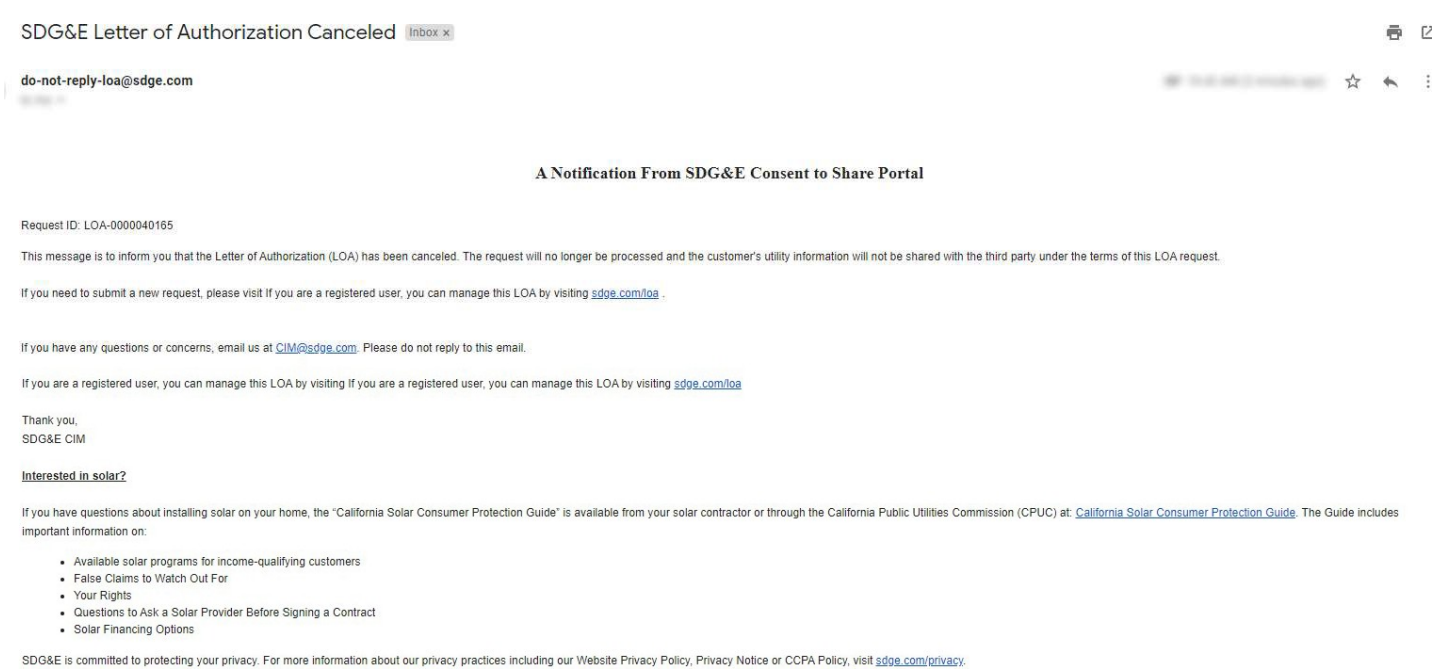
3. Click **'Yes'** to provide confirmation.



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



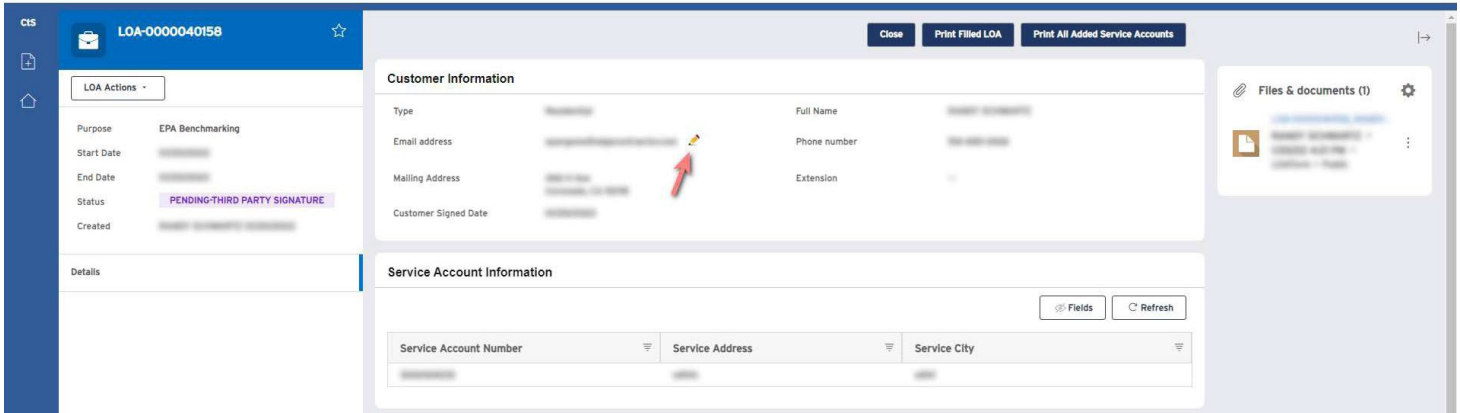
You will receive an email confirming the cancellation. The Third Party will also be informed about the cancellation.



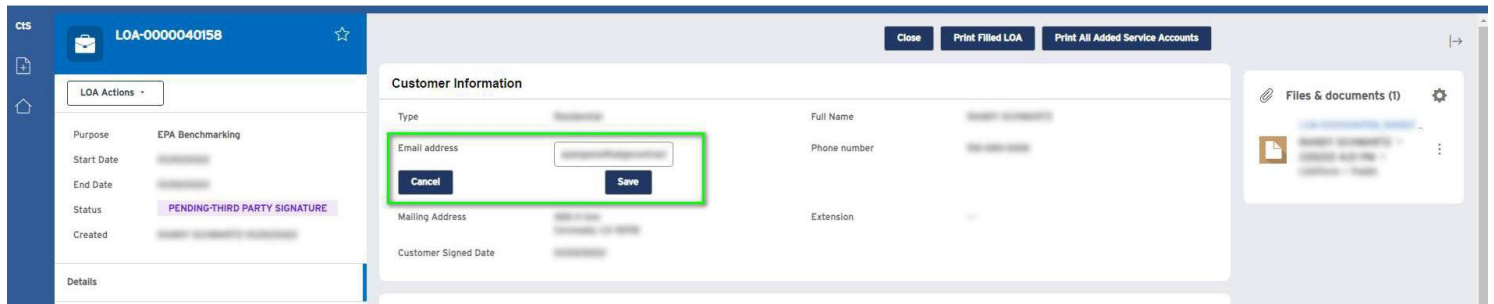
## How to update your email address in an existing LOA

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

1. Log into CtS and find the email address you'd like to update.
2. Click on the **pencil icon** displayed next to the email address.



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



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



Subject: SDG&E Letter of Authorization Email Address Update



**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
LOA-0000040158	<a href="mailto:sdge@sdge.com">sdge@sdge.com</a>	<a href="mailto:sdge@sdge.com">sdge@sdge.com</a>

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) 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

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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).