From: Weisz, Dawn
Sent: 5/27/2010 1:15:04 PM
To: Roscow, Steve (steve.roscow@cpuc.ca.gov); Horner, Trina
          (/O=PG&E/OU=CORPORATE/CN=RECIPIENTS/CN=TNHC); Redacted
          Redacted

          Redacted   Kirby
          Dusel (KDusel@navigantconsulting.com); John Dalessi
          (JDalessi@navigantconsulting.com)
Cc: Velasquez, Carlos A. (carlos.velasquez@cpuc.ca.gov)
Bcc:
Subject: RE: MEA-PG&E shared database

Steve and Redacted

The highlighted section below simply refers to an outstanding data request from April 27th that is
definitely needed as soon as possible, but is happening on a separate track.

Thanks,

Dawn

From: Roscow, Steve [mailto:steve.roscow@cpuc.ca.gov]
Sent: Thursday, May 27, 2010 10:17 AM
To: Redacted   (ESP Services); Weisz, Dawn; Horner, Trina; Redacted   John Dalessi; Kirby Dusel;
Redacted
Cc: Velasquez, Carlos A.
Subject: RE: MEA-PG&E shared database

Redacted

Thanks for the response. Here are 2 questions:

First, one statement in your note is confusing to me, so perhaps both you and MEA could clarify:

"MEA has recently requested additional data elements (and are included in the suggested table below) to support their particular business needs. We are currently developing a report to provide this information at cost pursuant to Rule 23.C.3 and Schedule E-CCAINFO."

How does MEA's recent request relate to the new items in this database? Are we double-tasking here?

Second, I've copied the new lines MEA is requesting below (and separated the "opt out flag" from the "method of opt out", so now I have added a line.) Could you tell us what your specific objection is to each of these lines?

I'd like to get everyone's underlying issues on the table and address them and move forward.

Thanks again,

Steve

Field Name	Sample of Data	Number of Characters	Data Type	Field Description/Notes
Opt out Flag	Yes	3	Alpha	??????????
Method of Opt out	?????????????????	???	???	????????
Date Opt out	11/30/2006	DTTM	Date	Date of Opt out
Opt out Rep	last, first	50	Alpha-numeric	Name of Customer Service Rep who assisted with Opt out

From: |Redacted| (ESP Services)|Redacted |
Sent: Wednesday, May 26, 2010 10:52 PM
To: Weisz, Dawn; Roscow, Steve; Horner, Trina; |Redacted | ; John Dalessi; Kirby Dusel; |Redacted |
|Redacte |
Cc: Velasquez, Carlos A.
Subject: RE: MEA-PG&E shared database

Dawn, Steve:

It appears that the primary purpose of this proposed "shared database" is for MEA to "verify the validity of customer opt-outs". As you may be aware, opt-out requests processed subsequent to the mass enrollment are communicated to MEA via a CCASR (Rule 23.I.9), so this information is already available to MEA. Customers whose opt-out requests are received prior to the mass enrollment are removed from the list of mass enrolled accounts that has been provided to you and are required to be excluded in the customer information update. (Rule 23.J.2). As we previously have indicated, PG&E is very concerned about potential customer privacy and confidentiality issues, and therefore cannot provide you this customer-specific information without further discussion and guidance.

While I recall an idea of a "shared database" concept, we have not had any further discussions on this idea, how it would be used, and if there are more efficiently means of facilitating this data exchange. As you note below, the majority of the data elements listed has already been provided to MEA, and will continue to be sent on a monthly basis, as part of our existing process for ESPs in the DA marketplace. The standard data elements provided in our monthly report has been developed for the necessary operational needs of a 3rd party power provider. This data is already transmitted to an ESP/CCA in our standard electronic transactions, and these monthly "snapshots" are intended as a reconciliation tool to identify discrepancies in our databases.

MEA has recently requested additional data elements (and are included in the suggested table below) to support their particular business needs. We are currently developing a report to provide this information at cost pursuant to Rule 23.C.3 and Schedule E-CCAINFO.

As we indicated, PG&E is very concerned about potential customer privacy and confidentiality issues, and while we may be willing to provide customer information for opt-out requests received prior to mass enrollment, we will need this to be specifically authorized by the Commission. We are willing to meet with Energy Division and MEA to resolve these privacy related issues, and agree on a CPUC process that would allow us to lawfully share this confidential information. In light of Decision D.10-05-050, I recommend we further discuss these data sharing issues in conjunction with the implementation of those overall tariff changes and MEA's decision of processing opt-out requests going forward.

Thanks,

Redacted

From: Weisz, Dawn [mailto:DWeisz@co.marin.ca.us]
Sent: Wednesday, May 26, 2010 6:08 PM
To: Roscow, Steve; Redacted (ESP Services); Horner, Trina; Redacted ; John Dalessi; Kirby Dusel
Cc: Velasquez, Carlos A.
Subject: RE: MEA-PG&E shared database

Maybe it should be a separate line item?

Either way is fine as long as the information is showing.

Thanks!

Dawn

From: Roscow, Steve [mailto:steve.roscow@cpuc.ca.gov]
Sent: Wednesday, May 26, 2010 1:46 PM
To: Weisz, Dawn; Redacted ESP Services); Horner, Trina; Redacted ; John Dalessi; Kirby Dusel
Cc: Velasquez, Carlos A.
Subject: RE: MEA-PG&E shared database

Okay, then as I understand databases, this line is not formatted correctly.

Steve

From: Weisz, Dawn [mailto:DWeisz@co.marin.ca.us]
Sent: Wednesday, May 26, 2010 1:27 PM
To: Roscow, Steve; Redacted (ESP Services); Horner, Trina; Redacted ; John Dalessi; Kirby Dusel
Cc: Velasquez, Carlos A.
Subject: RE: MEA-PG&E shared database

We need to know the <u>method</u> of opt out.

From: Roscow, Steve [mailto:steve.roscow@cpuc.ca.gov]
Sent: Wednesday, May 26, 2010 1:26 PM
To: Weisz, Dawn; ┌─────────┐ (ESP Services); Horner, Trina; ┌─────────┐ ; John Dalessi; Kirby Dusel
　　　　　　　　　│Redacted│　　　　　　　　　　　　│Redacted│
Cc: Velasquez, Carlos A.
Subject: RE: MEA-PG&E shared database

Thanks, Dawn,

One quick question: is there are a mismatch in the row I've copied below?

Field Name	Sample of Data	Number of Characters	Data Type	Field Description/Notes
Opt out Flag	Yes	3	Alpha	Method of Opt out.

The flag seems to be "yes" or "no", but the field description says "method of opt out"—is this a request for a specific method? Or do you just want to know the yes or no?

Steve

From: Weisz, Dawn [mailto:DWeisz@co.marin.ca.us]
Sent: Wednesday, May 26, 2010 12:43 PM
To: Roscow, Steve; ┌─────────┐ (ESP Services); Horner, Trina; ┌─────────┐ ; John Dalessi; Kirby Dusel
　　　　　　　　　　│Redacted│　　　　　　　　　　　　│Redacted│
Cc: Velasquez, Carlos A.
Subject: RE: MEA-PG&E shared database

My response to item 2 is shown with highlights below…

From: Roscow, Steve [mailto:steve.roscow@cpuc.ca.gov]
Sent: Wednesday, May 26, 2010 12:38 PM
To: Weisz, Dawn; Redacted (ESP Services); Horner, Trina; Redacted ; John Dalessi; Kirby Dusel
Cc: Velasquez, Carlos A.
Subject: RE: MEA-PG&E shared database

Dawn and Redacted

To move along our conversation about the shared database, here are a couple of questions for each of you—please respond in writing:

1. **to either/both**: What is the basis (i.e., tariff authority or other?) for the "monthly snapshot" for SEMPRA?
2. **to Dawn**: Please identify (highlight) the fields that have been added to that original set of fields to create this database?
3. **to** Redacted What is PG&E's response to the idea of adding those fields?

Thanks--

From: Weisz, Dawn [mailto:DWeisz@co.marin.ca.us]
Sent: Tuesday, May 18, 2010 2:39 PM
To: Redacted (ESP Services)
Cc: Roscow, Steve; Velasquez, Carlos A.; Fitch, Julie A.
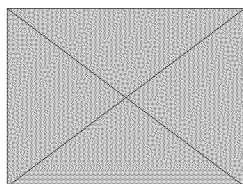**Subject:** MEA-PG&E shared database

Hi Redacte

I am forwarding this to you at Steve's request to follow up on the "shared database' concept which we all discussed at the meeting on May 11ᵗʰ. As we discussed, the purpose of this would be to allow us to verify the validity of customer opt outs. This database could also assist PG&E and MEA on a going forward basis in tracking information using the same dataset.

We have provided two options to as described below. To keep things as easy for you as possible we have taken the same fields that you put in your monthly snap shot for PoI and just added to that. Let us know what option you prefer.

We need access to this information as soon as possible but at least by the end of the week so that we have a clear sense of the customers and the valid opt-outs.

Thank you for you prompt attention to this item.

Dawn

Dawn Weisz

Interim Director

Marin Energy Authority

3501 Civic Center Drive, Rm. 308

San Rafael, CA 94903

415-507-2706; www.marinenergyauthority.org

From: Weisz, Dawn
Sent: Friday, May 14, 2010 5:25 PM
To: 'Roscow, Steve'
Subject: FW: MEA Snapshot with mailing address.

Hi Steve,

Here is our first stab at a 'shared database' which Pol created by taking what PG&E sends in
their monthly snap shot and modified it a bit to fit our needs so this should be easy for all
parties.   Note, there are two options:

Option 1 - Shared Database - This database will be accessible to MEA (Access
method to be determined) Data base will contain the following data fields.

Field Name	Sample of Data	Number of Characters	Data Type	Field Description/Notes
Account Id	9527013233	10	Numeric	Billing account number (not used for submitting DASRs)
Service Agreement Id (Sa Id)	0000223003	10	Numeric	PG&E Customer Identifier
SA Status Desc	Pending-Stop		Alpha-numeric	Current status of the SA (*if status = Pending-Stop, SVC-Disconnect DASR is issued; yet SA still assigned to the active ESP at that time
DA Xref Char	0000223003	10	Alpha-numeric	Non-changing customer account identifier number
Customer Name	JOE CUSTOMER	50	Alpha-numeric	Name of customer or business
Prem Address1	123 ROSE LANE	64	Alpha-numeric	Service address for premise
Prem Address2	HWY 1	64	Alpha-numeric	Service address for premise (additional text, if applicable)
Prem City	SAN FRANCISCO	30	Alpha-numeric	Service city name for premise
Prem State	CA	2	Alpha-numeric	Service state abbreviation for premise
Prem Postal	94105	5	Numeric	Service zip code for premise (required for initial DASR)
Prem County	SAN FRANCISCO	30	Alpha-numeric	Service county name for premise
Per Address1	254 E WALNUT ST	64	Alpha-numeric	Mailing address for premise
Per Address2	ATTN: JANE CUSTOMER	64	Alpha-numeric	Mailing address for premise (additional text, if applicable)
Per City	BOISE	30	Alpha-numeric	Mailing city name for premise
Per State	ID	2	Alpha-	Mailing state abbreviation for premise
Next Scheduled Read	00/05/00 12:00		Alpha-	geographic zone for the premise

Sch Switch Dt	10/15/02 12:00 AM	DTTM	Date	Scheduled date for CCA switch
Act Switch Dt	10/15/02 12:00 AM	DTTM	Date	Effective date for CCA relationship switch
Pend Status	PEND-MTR	8	Alpha-numeric	Identifies if switch is pending or current
Badge Nbr	1M2038	30	Alpha-numeric	Meter number for meter installed at the service point
Install Dte	01/01/10 03:01PM	DTTM	Alpha-numeric	Date and time of meter installation
PG&E Rate	E1	8	Alpha-numeric	The UDC rate for the customer's SA
Baseline Code	X	1	Alpha-numeric	Identified baseline territory climate geographic zone for the premise location
E Enduse Ch	T	1	Alpha-numeric	Medical base line and heat source
Town or Territory Desc	CAMPBELL INC	20	Alpha-numeric	Town or Territory Description
Prim NAICS Ch	111335	6	Numeric	Standard industry code assigned to non-residential customers
Load Point Id	ELCRRT_1_V100LD	20	Alpha-numeric	Load point identification
Sp Id	0583948405	10	Alpha-numeric	Service point identification
Bill Cycle Cd	H	2	Alpha-numeric	Code for cycle the billing is scheduled to occur
Mr Cycle Cd	H	2	Alpha-numeric	Code for cycle the meter read is scheduled to occur
Next Sched Read Dt	12/31/2006	DTTM	Date	Meter Reading Schedule Date
Mtr Volt Lvl Cd Ch	T	2	Alpha-numeric	Service "voltage" category for the associated SA
Mtr Config Type Cd	KWH	10	Alpha-numeric	Identified type of meter installed at the service point
Last Bill Dt	11/30/2006	DTTM	Date	Date of most recent bill provided to customer
Opt out Flag	Yes	3	Alpha	Method of Opt out.
Date Opt out	11/30/2006	DTTM	Date	Date of Opt out
Opt out Rep	last, first	50	Alpha-numeric	Name of Customer Service Rep who assisted with Opt out
Dwelling Units	5	5	Numeric	Number of Dwelling Units
Medical baseline	1	5	Numeric	Number of Medical Baseline allocation
Horse Power	1/2/1900	5	Numeric	Horse Power of the Agricultural pump.

Option 2 – Daily Report containing the above data elements.

Email Disclaimer: http://www.co.marin.ca.us/nav/misc/EmailDisclaimer.cfm