

Attachment 1: Reporting form for [Part (a) Process]

Part (a): Process for existing and prospective CCAs to obtain timely utility compliance with paragraph (9) of subdivision (c) of Public Utilities Code Section 366.2, which requires the utility to “cooperate fully with any community choice aggregators that investigate, pursue, or implement community choice aggregation programs.”

PART 1 (to be completed by CCA)

Submitted by:

Name	Jordis Weaver
Title	Administrative Associate
Phone	415.464.6021
e-mail	jweaver@marinenergyauthority.org

Please identify the specific matter on which the utility is not considered to be cooperating fully (add lines or pages as needed):

PG&E will not provide data on CARE customers to MEA.

Please provide a detailed description of the issue (add lines or pages as needed):

When MCE was in the process of enrolling customers with PG&E, data on which customers were receiving the CARE rate was provided to MCE. This data was provided so that these customers could be provided with the equivalent MCE rate, to avoid potential hardship for the customer.

After enrollment was complete and service began, new customers began to move into MCE enrolled addresses, and some customers applied for the CARE rate post-enrollment. To accommodate the needs of any new CARE customers MCE requested that PG&E provide data on any new CARE customers being served by MCE.

PG&E representatives have not provided this data, and as a result MCE is unable to offer the CARE-equivalent rate to customers who qualify for the CARE rate.

Please describe the lack of full cooperation (add lines or pages as needed):

This issue was the subject of ongoing weekly calls between MCE, MCE’s data manager and PG&E representatives in August and September, 2010. PG&E representatives initially offered

to look into the issue and after several weeks reported that they would not be able to provide the data due to confidentiality concerns.

MCE noted that this data had been provided previously, and furthermore, would fall under MCE’s signed non-disclosure agreement (NDA). However, PG&E representatives were still not willing to provide the CARE data.

MCE suggested in October, 2010 that at least to address the issue on a going forward basis, that a ‘check box’ could be added to the customer’s CARE application form explicitly allowing PG&E to share this information with third-party energy providers. PG&E representatives agreed that this might resolve the issue on a going forward basis, but they have not taken any steps, to MCE’s knowledge, to make this change to the form.

Since enrollment of MCE customers in April, 2010 no CARE data has been provided to MCE and PG&E has not suggested or followed through with any strategy to resolve this issue.

Please list the personnel at the utility with whom the community choice aggregator is working:

Name	Title	Phone Number	e-mail
Redacted	PG&E Energy Solutions & Service	Redacted	
Eric Jacobson	Regulatory Relations	415-973-4464	EBJ1@pge.com
Redacted	PG&E Energy Solutions & Service	Redacted	

PART 2 (to be completed by Utility, 5 business days after notification by Energy Division)
Submitted by:

Name	Redacted
Title	Sr. Account Manager
Phone	Redacted
e-mail	

“The utility shall be required to respond in writing by providing a specific solution to the matter raised by the prospective or existing community choice aggregator, including a date-specific timeline for accomplishing the solution, and the names of personnel responsible for providing the solution.”

Please describe the specific solution to the matter raised by the prospective or existing Community Choice Aggregator (add lines or pages as needed):

PG&E is open to sharing customer-specific CARE eligibility information provided that the individual customers consent to provide such information to MCE or the Commission authorizes the sharing of the information without customer consent consistent with the Commission's customer privacy rules and policies. To this end, PG&E previously proposed to MCE to file an advice letter requesting Commission approval to allow the sharing of this customer specific information with MCE without customer consent. However, the CPUC Energy Division recommended that PG&E not make this filing until further discussions could occur. In the meantime, there is no restriction on MCE obtaining this customer-specific information directly from customers requesting service directly from MCE under normal Commission privacy rules and standards.

The sharing of CARE eligibility information is strictly within the context of CCA startup and automatic enrollment (Phase 1A, 1B, and future phases). Elective (“Positive”) enrollments are outside of this framework and subject to individual customer consent and election.

Alternatively, the Commission could consider approving a revision to the CCA non-disclosure agreement (NDA) to expressly include the sharing of customer CARE (and other appropriate) eligibility information as part of the confidential exchange of customer information between utilities and CCAs consistent with Commission protection of customer privacy. The revised NDA could allow the exchange of the CARE-related eligibility information. PG&E is willing to work with MCE, Energy Division and Legal Division staff to consider these changes to the NDA.

Please provide the date-specific timeline that the IOU will follow in order to accomplish the solution (add lines or pages as needed):

PG&E is willing to move forward immediately with mutual changes to CCA tariffs and the CCA NDA to accomplish the sharing of CARE-related information consistent with customer privacy rights and protections.

Names of utility personnel responsible for providing [and implementing] the solution

Name	Title	Phone Number	e-mail
Redacted	Sr. Account Mngr.	Redacted	