

PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3298



January 12, 2016

Advice Letter 4909

Ronald van der Leeden
Director, Regulatory Affairs
Southern California Gas
555 W. Fifth Street, GT14D6
Los Angeles, CA 90013-1011

**Subject: Revision of Energy Efficiency Financing Pilot Programs
Authorization or Revocation of Authorization to Release
Customer Information Form**

Dear Mr. van der Leeden:

Advice Letter 4909 is effective January 21, 2016.

Sincerely,

A handwritten signature in cursive script that reads "Edward Randolph".

Edward Randolph
Director, Energy Division



Ronald van der Leeden
Director
Regulatory Affairs

555 W. Fifth Street, GT14D6
Los Angeles, CA 90013-1011
Tel: 213.244.2009
Fax: 213.244.4957

RvanderLeeden@semprautilities.com

December 22, 2015

Advice No. 4909
(U 904 G)

Public Utilities Commission of the State of California

Subject: Revision of Energy Efficiency Financing Pilot Programs Authorization or Revocation of Authorization to Release Customer Information Form

Southern California Gas Company (SoCalGas) hereby submits for approval by the California Public Utilities Commission (Commission) revisions to its tariff, Authorization or Revocation of Authorization to Release Customer Usage Information (Form 7300), applicable throughout its service territory, as shown on Attachment A.

Purpose

The purpose of this filing is to replace Form 7300, relative to the Energy Efficiency Financing Pilot Programs (Financing Pilots), in order to incorporate changes made by the California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA), as directed by Energy Division on December 7, 2015.

Discussion

CAEATFA, as the California Hub for Energy Efficiency Financing for the Financing Pilots, recommended that the Investor Owned Utilities¹ (IOUs) update their programmatic Customer Info Standardized Request (CISR) forms to help facilitate data collection and form processing by CAEATFA for the Financing Pilots. CAEATFA's recommendations included adding labels to form fields, formatting changes, and modifying field descriptions to make the form more user-friendly.

¹ The IOUs consist of SoCalGas, San Diego Gas & Electric Company, Southern California Edison Company, and Pacific Gas & Electric Company.

Starting in November 2015, CAEATFA and SoCalGas exchanged several written drafts via email regarding form changes. In December 2015, SoCalGas and CAEATFA had in-person and phone discussions to finalize form edits. SoCalGas' Form 7300, included in this filing, incorporates all SoCalGas, CAEATFA, and legal edits.

Revised Form 7300

Tariff language for the Financing Pilots in Form 7300 is revised to reflect the recommendations made by CAEATFA, as described below:

<u>Page</u>	<u>Section</u>	<u>Change</u>
2	Authorization Details	Changes to Section names, reference to page numbers
	1. Contact Information	<ul style="list-style-type: none"> • Added field labels • Qualifiers to applicable fields • Streamlined for user friendliness
	2. Authorization Period	<ul style="list-style-type: none"> • Added field labels • Qualifiers to applicable fields
	3. Billing Account Number(s) to be Authorized	<ul style="list-style-type: none"> • Clarified sections for residential/commercial/multi-family accounts • Added field labels • Qualifiers to applicable fields
3	4. Agree to Terms and Conditions	<ul style="list-style-type: none"> • Moved up in the document for user friendliness
4	Submit Authorization	<ul style="list-style-type: none"> • Streamlined instructions
5	Revoke an Existing Authorization	<ul style="list-style-type: none"> • Clarified sections for residential/commercial/multi-family accounts • Added field labels • Qualifiers to applicable fields

This filing will not increase or decrease any rate or charge, conflict with any schedules or rules, or cause the withdrawal of service.

Protest

Anyone may protest this Advice Letter to the Commission. The protest must state the grounds upon which it is based, including such items as financial and service impact, and should be submitted expeditiously. The protest must be made in writing and received within five days of the date of this Advice Letter, which is December 27, 2015.

Pursuant to Energy Division, it is reasonable to have a shortened protest period of five days given that the main substance of Form 7300 has previously been reviewed and approved, and that Form 7300 is necessary in order for customers to participate in the Financing Pilots.² There is no restriction on who may file a protest. The address for mailing or delivering a protest to the Commission is:

CPUC Energy Division
Attn: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102

Copies of the protest should also be sent via e-mail to the attention of Energy Division Tariff Unit (EDTariffUnit@cpuc.ca.gov). A copy of the protest should also be sent via both e-mail and facsimile to the address shown below on the same date it is mailed or delivered to the Commission.

Attn: Sid Newsom
Tariff Manager - GT14D6
555 West Fifth Street
Los Angeles, CA 90013-1011
Facsimile No. (213) 244-4957
E-mail: snewsom@SempraUtilities.com

Effective Date

SoCalGas believes that this filing is subject to Energy Division disposition and should be classified as Tier 2 (effective after staff approval) pursuant to General Order (GO) 96-B. SoCalGas respectfully requests the tariff sheets filed herein be effective on January 21, 2016, which is 30 calendar days from the date filed.

Notice

A copy of this AL is being sent to SoCalGas' GO 96-B service list and the Commission's service lists in A.12-07-003, et al., and R.13-11-005. Address change requests to the GO 96-B should be directed by electronic mail to tariffs@socalgas.com or call 213-244-3387.

² Energy Division communication via e-mail sent to the IOUs on December 7, 2015.

For changes to all other service lists, please contact the Commission's Process Office at 415-703-2021 or by electronic mail at Process_Office@cpuc.ca.gov.

Ronald van der Leeden
Director - Regulatory Affairs

Attachments

CALIFORNIA PUBLIC UTILITIES COMMISSION

ADVICE LETTER FILING SUMMARY ENERGY UTILITY

MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No. **SOUTHERN CALIFORNIA GAS COMPANY (U 904G)**

Utility type:

ELC GAS
 PLC HEAT WATER

Contact Person: Sid Newsom

Phone #: (213) 244-2846

E-mail: SNewsom@semprautilities.com

EXPLANATION OF UTILITY TYPE

ELC = Electric GAS = Gas
PLC = Pipeline HEAT = Heat WATER = Water

(Date Filed/ Received Stamp by CPUC)

Advice Letter (AL) #: 4909

Subject of AL: Revision of Energy Efficiency Financing Pilot Programs Authorization or Revocation of Authorization to Release Customer Information Form

Keywords (choose from CPUC listing): Energy Efficiency, Compliance

AL filing type: Monthly Quarterly Annual One-Time Other _____

If AL filed in compliance with a Commission order, indicate relevant Decision/Resolution #:

D15-06-008

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL No

Summarize differences between the AL and the prior withdrawn or rejected AL¹: N/A

Does AL request confidential treatment? If so, provide explanation: No

Resolution Required? Yes No

Tier Designation: 1 2 3

Requested effective date: January 21, 2016

No. of tariff sheets: 3

Estimated system annual revenue effect (%): N/A

Estimated system average rate effect (%): N/A

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected: Sample Forms and TOCs

Service affected and changes proposed¹: N/A

Pending advice letters that revise the same tariff sheets: _____

Protests and all other correspondence regarding this AL are due no later than 20 days after the date of this filing, unless otherwise authorized by the Commission, and shall be sent to:

CPUC, Energy Division

Attention: Tariff Unit

505 Van Ness Ave.,

San Francisco, CA 94102

mas@cpuc.ca.gov and jnj@cpuc.ca.gov

Southern California Gas Company

Attention: Sid Newsom

555 West 5th Street, GT14D6

Los Angeles, CA 90013-1011

SNewsom@semprautilities.com

¹ Discuss in AL if more space is needed.

ATTACHMENT A
Advice No. 4909

Cal. P.U.C. Sheet No.	Title of Sheet	Cancelling Cal. P.U.C. Sheet No.
Revised 52177-G	SAMPLE FORMS - CONTRACTS, AUTHORIZATION OR REVOCATION OF AUTHORIZATION, TO RELEASE CUSTOMER USAGE INFORMATION, FORM 7300	Original 51534-G
Revised 52178-G	TABLE OF CONTENTS	Revised 51536-G
Revised 52179-G	TABLE OF CONTENTS	Revised 52176-G

SAMPLE FORMS - CONTRACTS
AUTHORIZATION OR REVOCATION OF AUTHORIZATION
TO RELEASE CUSTOMER USAGE INFORMATION, FORM 7300

(See Attached Form)

(TO BE INSERTED BY UTILITY)
ADVICE LETTER NO. 4909
DECISION NO. 15-06-008

ISSUED BY
Dan Skopec
Vice President
Regulatory Affairs

(TO BE INSERTED BY CAL. PUC)
DATE FILED Dec 22, 2015
EFFECTIVE Jan 21, 2016
RESOLUTION NO. _____

This *Authorization or Revocation of Authorization to Release Customer Information* (“Authorization”): (1) authorizes Southern California Gas Company (“Utility”) to release your energy usage data to the Master Servicer, which will release such data to the Data Manager and Contractor Manager, all in accordance with the rules of, and as a condition of, your participation in Utility’s Energy Efficiency Financing Pilot Programs (“Programs”), as administered by CAEATFA; or (2) revokes an existing Authorization.

If you do not wish to share your energy usage data as described herein, you are not required to fill out this Authorization, but you will be unable to participate in the Programs.

You may also revoke your authorization at any time after signing this Authorization, but such revocation may lead to the termination of your participation in the Programs and may breach the terms and conditions of your loan or lease agreement with your lender.

Definitions:

“CAEATFA”: The California Alternative Energy and Advanced Transportation Financing Authority, a public instrumentality of the State of California, or its agents, that administer the Programs for the California investor-owned utilities, or any successor administrator approved by the California Public Utilities Commission (“CPUC”).

“Contractor Manager”: An entity hired by and under contract with CAEATFA to manage qualified contractor activity under the Programs. The Contractor Manager will perform quality assurance procedures for which it may require the customer contact information and the installed project information. The Contractor Manager’s contract with CAEATFA will require the Contractor Manager to protect the confidentiality of your contact and project information and prevent unauthorized contact and project information from being released to any other entity. CAEATFA may assume the obligations of the Contractor Manager.

“Data Manager”: An entity hired by and under contract with CAEATFA solely to collect statewide energy usage data and data regarding the financial products provided to customers participating in the Programs and build a database for the aggregated and anonymized data provided by the Master Servicer. The Data Manager’s contract with CAEATFA will require the Data Manager to protect the confidentiality of your usage data and prevent unauthorized disclosure of your usage data to any other entity. CAEATFA may assume the obligations of the Data Manager.

“Master Servicer”: An entity hired by and under contract with CAEATFA. The Master Servicer will use customer energy usage data solely to: (1) establish a master file including project and financial product data for each loan and lease enrolled in the Programs; and (2) develop and update financial product servicing data files to be maintained throughout the term during which the loans and leases are enrolled in the Programs. The Master Servicer’s contract with CAEATFA requires the Master Servicer to protect the confidentiality of your usage data and prevent unauthorized disclosure of your usage data to any other entity. The Master Servicer will aggregate and anonymize the data for the purpose of evaluating the Programs. CAEATFA may assume the obligations of the Master Servicer.



AUTHORIZATION DETAILS

Please select the action you wish to take:

- CREATE A NEW AUTHORIZATION – Please Complete Sections 1, 2, 3, and 4 (pages 2-4)
- REVOKE AN EXISTING AUTHORIZATION – Please skip to pages 5-6

CREATE A NEW AUTHORIZATION

Section 1. Contact Information:

- (A) First Name: _____
- (B) Last Name: _____
- (C) Business Name (if applicable): _____
- (D) Title of Signer (if applicable): _____
- (E) Mailing/Billing Address: _____
- (F) Phone Number: _____
- (G) E-mail Address: _____

Section 2. Authorization Period:

This Authorization is effective upon your execution and authorizes Utility to release and provide ongoing access to your monthly energy usage data to the Master Servicer (which will release such data to the Data Manager and Contractor Manager in accordance with the rules of the Programs) for the period commencing on the date that is twelve (12) months before the date that you sign this Authorization and ending on (J) _____ [please check with your lender to confirm the end date of your loan or lease term].

Section 3. Billing Account Number(s) to be Authorized

Residential Accounts

Please specify the Account Number under which you are authorizing the Master Servicer, Data Manager, and Contractor Manager to access your energy usage data. Your Account Number can be found on your utility bill.

(L) SERVICE ADDRESS (Street Address, City)

(N) ACCOUNT NUMBER (first 10 digits only)

Commercial and Multi-family Accounts

Please specify the Service Address(es) and Account Number(s) under which you are authorizing the Master Servicer, Data Manager, and Contractor Manager to access your energy usage data. Please list all Service Addresses where you had work done as part of your financing agreement. Your Account Number(s) can be found on your utility bill.

(L1) SERVICE ADDRESS (Street Address, City)

(N1) ACCOUNT NUMBER (first 10 digits only)

(L2) SERVICE ADDRESS (Street Address, City)

(N2) ACCOUNT NUMBER (first 10 digits only)

(For more than two Accounts, please attach additional copies of this page)

Section 4. Agree to Terms and Conditions

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

By signing this Authorization, you are authorizing the Master Servicer, Data Manager, and Contractor Manager for the Programs to have access to your Utility energy usage data, consisting of your natural gas usage data, for the property(ies) where you have installed eligible Program measures. Your Utility energy usage data is independent from any information that a bank or other lender may require you to provide as a condition of your participation in the Programs.

Once you authorize the release of your energy usage data to the Master Servicer, the Data Manager, and the Contractor Manager, these entities and not the Utility or your lender, are responsible for ensuring the safety and security of your information.

By checking the box and signing below, you attest that you have read, understood, agree and authorize Utility to release the requested information on your account(s) to the Master Servicer, (which will release such data to the Data Manager and the Contractor Manager in accordance with the rules of the Programs), and you hereby release, hold harmless and indemnify Utility from any liability, claims, demands, causes of action, damages or expenses arising out of or in connection with:

1. Any release of information to the Master Servicer and/or the Data Manager and/or Contractor Manager pursuant to this Authorization;
2. The unauthorized use of this information by the Master Servicer and/or the Data Manager and/or the Contractor Manager; and/or



ENERGY EFFICIENCY FINANCING PILOT PROGRAMS AUTHORIZATION OR REVOCATION OF AUTHORIZATION TO RELEASE CUSTOMER INFORMATION



3. Any actions taken by the Master Servicer and/or the Data Manager and/or the Contractor Manager pursuant to their receipt of your energy usage data.

You also understand and acknowledge that you may revoke this Authorization at any time by completing and submitting to Utility the "Revoke an Existing Authorization" Section (page 5) of this Authorization. Your participation in the Programs may be terminated if you revoke this Authorization during your participation in the Programs, and such revocation may breach the terms and conditions of your loan or lease agreement with your lender.

Finally, you consent to receive transactional e-mails regarding this Authorization.

Please check the appropriate box below and sign and date this Authorization.

TO CREATE A NEW AUTHORIZATION

(P) I, _____ [print name of authorized signatory], authorize Utility to provide the Master Servicer access to the energy usage data from the designated accounts in accordance with these terms and conditions. I understand that, pursuant to such authorization and in accordance with the rules of the Programs, the Master Servicer will release such energy usage data to the Data Manager and the Contractor Manager.

By signing 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 and that I have authority to financially bind the Customer. I understand Utility reserves the right to verify any authorization request submitted before releasing information or taking any action on my behalf. [*This Authorization must be signed by someone who has authority to financially bind the customer (for example, residential account holder, CFO of a company or City Manager of a municipality).*]

(Q) AUTHORIZED CUSTOMER SIGNATURE

(R) DATE

SUBMIT AUTHORIZATION

This Authorization must be sent according to the following instructions:

Instructions for lenders – Please include an executed Authorization with your loan enrollment or project pre-approval request to CAEATFA per Program instructions. Additional information can be found on CAEATFA's website: www.treasurer.ca.gov/CAEATFA/cheef.

REVOKE AN EXISTING AUTHORIZATION

You may revoke this Authorization at any time by filling out this Section and executing below. Revoking this Authorization may breach the terms and conditions of your loan or lease agreement with your lender.

Billing Account Number(s) to be Revoked:

Please provide the Account Number(s) associated with the Authorization you wish to revoke. Your Account Number can be found on your utility bill.

Residential Accounts

Please specify the Account Number(s) under which you are revoking authorization for the Master Servicer, Data Manager, and Contractor Manager to access your energy usage data. Your Billing Account Number can be found on your utility bill.

(L) SERVICE ADDRESS (Street Address, City)

(M) ACCOUNT NUMBER (first 10 digits only)

Commercial and Multi-family Accounts

Please specify the Account Number(s) under which you are revoking authorization for the Master Servicer, Data Manager, and Contractor Manager to access your energy usage data. Your Billing Account Number(s) can be found on your utility bill.

(L1) SERVICE ADDRESS (Street Address, City)

(N1) ACCOUNT NUMBER (first 10 digits only)

(L2) SERVICE ADDRESS (Street Address, City)

(N2) ACCOUNT NUMBER (first 10 digits only)

(For more than two Accounts, please attach additional copies of this page)

TO REVOKE AN EXISTING AUTHORIZATION

I, _____ [print name of authorized signatory], instruct the Utility to cease to provide the Master Servicer access to the energy usage data from the designated accounts in accordance with these terms and conditions. I understand that such revocation may breach the terms and conditions of the loan or lease agreement with my lender. I also understand that this revocation does not modify or affect any energy usage data provided to the Master Servicer prior to revocation.

By signing 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 and that I have authority to financially bind the Customer. I understand Utility reserves the right to verify any revocation of authorization request submitted before taking any action on my behalf. [*This Authorization must be signed by someone who has authority to financially bind the customer (for example, residential account holder, CFO of a company or City Manager of a municipality).*]

AUTHORIZED CUSTOMER SIGNATURE

DATE

SUBMIT REVOCATION

This revocation must be sent according to the following instructions:

Instructions for customers to revoke an existing Authorization – Please send the executed Authorization by email to SCGEEFP@semprautilities.com.

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(Continued)

(TO BE INSERTED BY UTILITY)
 ADVICE LETTER NO. 4909
 DECISION NO. 15-06-008

ISSUED BY
Dan Skopec
 Vice President
 Regulatory Affairs

(TO BE INSERTED BY CAL. PUC)
 DATE FILED Dec 22, 2015
 EFFECTIVE Jan 21, 2016
 RESOLUTION NO. _____

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The following listed sheets contain all effective Schedules of Rates and Rules affecting service and information relating thereto in effect on the date indicated thereon.

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(Continued)

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Dan Skopec
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