

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. 4927
DECISION NO. 13-09-044

ISSUED BY
Dan Skopec
Vice President
Regulatory Affairs

(TO BE INSERTED BY CAL. PUC)
DATE FILED Feb 22, 2016
EFFECTIVE Feb 22, 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.



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

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 (Street): _____
(E) City: _____ Zip: _____
(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.

(L1) SERVICE ADDRESS (Street Address) (City) (Zip)

(N1) ACCOUNT NUMBER (first 10 digits only)



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

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) _____ (Zip) _____

_____ (N1) ACCOUNT NUMBER (first 10 digits only)

_____ (L1) SERVICE ADDRESS (Street Address) _____ (City) _____ (Zip) _____

_____ (N1) 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:



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

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
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.



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

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.

(L1) SERVICE ADDRESS (Street Address) (City) (Zip)

(N1) 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) (Zip)

(N1) ACCOUNT NUMBER (first 10 digits only)

(L1) SERVICE ADDRESS (Street Address) (City) (Zip)

(N1) ACCOUNT NUMBER (first 10 digits only)

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



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

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.