

Green Button Implementation Task Force Meeting 5 EB-2021-0183

1:30 – 3:30 p.m.

August 19, 2021

Agenda

- 1:30 – Welcome / Admin.
- 1:40 – Presentation and discussion
- 2:30 – Break
- 2:45 – Discussion
- 3:30 – End


Meeting #5 – Objectives / Areas for Discussion

1. Customer Authorization
2. User Experience – Availability of Data
3. 3rd Party / Utility Terms & Conditions

Customer Authorization

- Customer data access and sharing must be authorized by the utility account holder before any downloading or sharing of data can occur
- OEB staff understand that experience in other jurisdictions has found that if customers cannot access their data easily, they will be discouraged from doing so
- In its guiding principles, the Ministry has suggested that, in order to encourage participation, the authorization process should consider elements such as streamlining the number of pages for authorization, minimizing the number of “clicks” for authorization, simplifying authorization terms and conditions and alternative methods of authorization for those without online accounts

Examples of Customer Authorization Forms

 **CenterPoint Energy**

CONSENT TO DISCLOSE UTILITY CUSTOMER DATA

All requested information must be provided for the consent to be valid. This form may be available from your utility provider in other languages. To obtain a copy in another language, please contact your utility provider.

TO BE COMPLETED BY THE DATA RECIPIENT

Utility Name and Contact		
CenterPoint Energy		
Physical and Mailing Address		
505 Nicollet Avenue, P.O. Box 59038, Minneapolis, Minnesota 55459-0038		
Phone	Email	Fax
612-372-4727	custserv@centerpointenergy.com	612-321-4806
For additional information, including the utility's privacy policy, visit www.CenterPointEnergy.com		

By signing this form, you allow your utility to give the following information to:

Organization/Trade Name

Contact Name (if available)

Physical and Mailing Address

Phone	Email	Fax
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This organization will receive the following customer data:

Information from your meter collected by your utility service provider from natural gas service

Information regarding your participation in renewable energy, demand-side management, load management, energy efficiency or other utility programs

Other (specify) _____

This information will be used to:

Provide you with products or services you requested

Offer you products or services that may be of interest to you

Determine your eligibility for an energy program

Analyze your energy usage

Other (specify) _____

DATA COLLECTION PERIOD


The relevant timeframe associated with the requested data is from _____ and will

end on _____

be effective until terminated by you.

You may terminate this consent at any time by sending a written request with your name and service address to your utility.

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 **CenterPoint Energy**

CUSTOMER DISCLOSURES

*** Customer data can provide insight into activities within the premises receiving utility service. Your utility may not disclose your customer data except (1) if you authorize the disclosure, (2) to contracted agents that perform services on behalf of the utility, or (3) as otherwise permitted or required by laws or regulations.***

*** You are not required to authorize the disclosure of your customer data. Not authorizing disclosure will not affect your utility services.***

*** You may access your standard customer data from your utility without any additional charge.***

*** Your utility will have no control over the data disclosed pursuant to this consent, and will not be responsible for monitoring or taking any steps to ensure that the data recipient maintains the confidentiality of the data or uses the data as authorized by you. Please be advised that you may not be able to control the use or misuse of your data once it has been released.***

*** In addition to the [Customer Data] described above, the data recipient may also receive the following from your utility; your name; account number; service number; meter number; utility type; service address; premise number; premise description; meter read date(s); number of days in the billing period; utility invoice date; base rate bill amount; other charges including base rate and non-base rate adjustments; taxes; and invoice total amount. Your utility will not provide any other information, including Personally Identifiable Information such as your Social Security Number or any financial account number to the data recipient through this consent form.***

TO BE COMPLETED BY THE CUSTOMER

PLEASE READ THE ABOVE CUSTOMER DISCLOSURES BEFORE SIGNING THIS FORM

By signing this form you acknowledge and agree that you are the customer of record for this account and that you authorize your utility service provider to disclose your customer data as specified in this form.

CUSTOMER ACCOUNT NUMBER _____

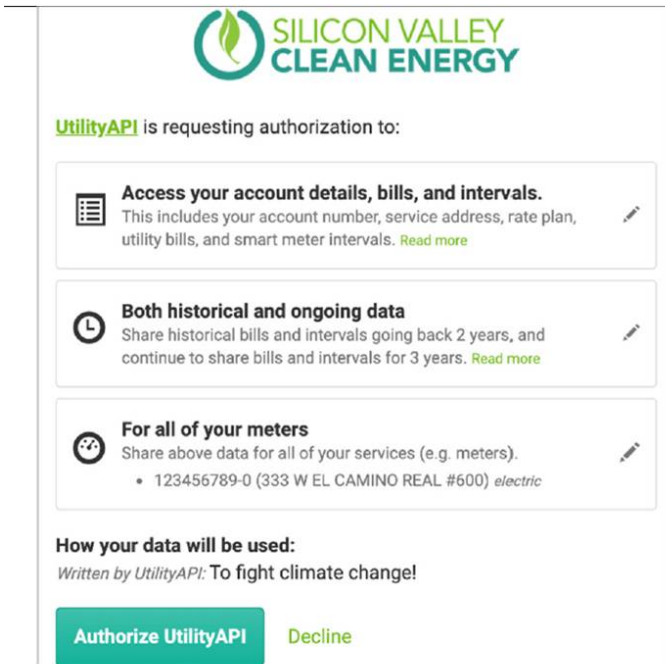
SERVICE ADDRESS _____

PRINTED NAME _____

SIGNATURE OF CUSTOMER OF RECORD _____ DATE SIGNED _____

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Examples of Customer Authorization Forms (continued)



SILICON VALLEY CLEAN ENERGY

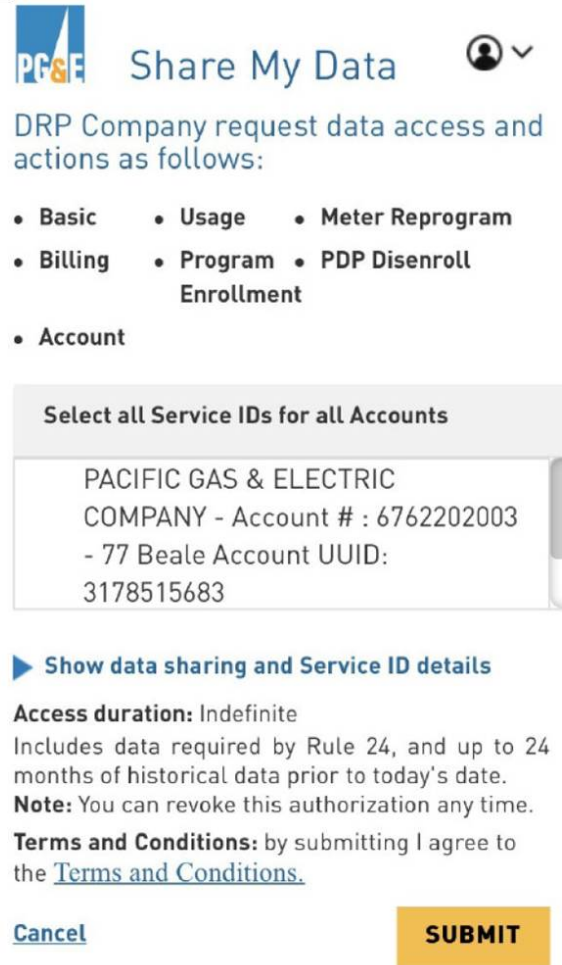
UtilityAPI is requesting authorization to:


- Access your account details, bills, and intervals.**
This includes your account number, service address, rate plan, utility bills, and smart meter intervals. [Read more](#)
- Both historical and ongoing data**
Share historical bills and intervals going back 2 years, and continue to share bills and intervals for 3 years. [Read more](#)
- For all of your meters**
Share above data for all of your services (e.g. meters).
 - 123456789-0 (333 W EL CAMINO REAL #600) *electric*

How your data will be used:
Written by UtilityAPI: To fight climate change!

[Authorize UtilityAPI](#) [Decline](#)

Figure 1: Example of Silicon Valley Clean Energy authorization screen.



PG&E Share My Data 

DRP Company request data access and actions as follows:

- Basic
- Usage
- Meter Reprogram
- Billing
- Program
- PDP Disenroll Enrollment
- Account

Select all Service IDs for all Accounts

PACIFIC GAS & ELECTRIC
COMPANY - Account # : 6762202003
- 77 Beale Account UUID:
3178515683

[▶ Show data sharing and Service ID details](#)

Access duration: Indefinite
Includes data required by Rule 24, and up to 24 months of historical data prior to today's date.
Note: You can revoke this authorization any time.
Terms and Conditions: by submitting I agree to the [Terms and Conditions](#).

[Cancel](#) [SUBMIT](#)

Authorization – Proposed Outcomes

- Customers are making informed decisions regarding the sharing of their data and what data will be shared, when and for how long
- The authorization process is streamlined / easy to understand / not cumbersome for the customer
- Customers understand they have a choice, are not required to authorize and can revoke access at any time
- It is easy for customers to revoke access
- Ensure that customers have access to the utility's policy regarding privacy of the energy data
- Customers without online accounts are able to authorize access
- The authorization process is not unduly restrictive for 3rd parties
- Are there other proposed key outcomes recommended by task force members?

Customer Authorization – Questions for TF

- What information should the customer be provided with during the authorization process to help to ensure the decision to download / share is an informed one?
- What is the appropriate balance in ensuring customers have sufficient information vs streamlined process?
- What guidance do utilities need from the OEB with respect to establishing their authorization and/or revocation processes?
 - What form should this guidance take?
 - When would utilities need the guidance for the purposes of moving forward with implementation?
- Are there any concerns from task force members with respect to customer authorization?

User Experience - Availability of Data

- In addition to streamlining the authentication process to improve the customer experience and encourage participation, other jurisdictions have also introduced requirements with respect to IT performance monitoring and transparency of availability of data. From the US policy summary:
 - California - website must show real-time performance statistics including availability, “funnel” metrics and start-to-finish times
 - Colorado - annual testing and reporting on IT system availability and performance metrics
 - Texas - 99.5% uptime requirement and monthly reporting on various metrics
- In an Ontario context:
 - Should similar metrics be established as part of the initial implementation?
 - What metrics should be considered (e.g. page load time / data processing time)?
 - How often should this information be reported (daily / weekly / monthly)?
 - How should the information be reported to ensure transparency and accountability?
 - As an alternative to specific metrics, do task force members have alternatives (e.g. an outcomes-based approach)?
 - When would utilities need specific guidance on any potential metrics to move forward with implementation?

3rd Party / Utility Terms & Conditions

- Utilities will need to set terms and conditions for authorization of 3rd party entities and those terms will also govern when authorization may be terminated
 - What are some key conditions that should be part of this?
 - What guidance do utilities need, understanding that based on what we heard last week there may be limited authority for setting out standard terms as requirements
- What could be constituted as a “significant violation” of the terms and conditions for the purposes of utility termination of a 3rd party’s authorization to access consumer data?

Next Meeting

- Data privacy
- Are there other items task force members would like to discuss?