

Instructions to complete and execute the electronic Customer Information Service Request (CISR) Form 14-796

The CISR Form 14-796, allows an SCE customer to authorize a designated Agent and/or Consultant (Agent) to receive service account information or act on their behalf for certain transactions. This authorization form is designed to protect the privacy rights of the SCE customer; therefore, the form must be completed in its entirety by the SCE customer and the Agent. Any alterations to the CISR form after it has been executed by the SCE customer will render it null and void.

CUSTOMER INFORMATION

- The customer information portion of the form should be filled out by the customer or someone within the customer's organization who has the authority to financially bind the customer (e.g., CFO of a company or City Manager of a municipality).
Note: The individual named should be the same individual as the authorized customer signer at the end of the form.
- In this section list all service account(s) for which you wish to authorize access. If there are more than three (3) service accounts, please list the additional service accounts and service account addresses on a separate sheet and attach it to the form by uploading the file using the *attachment icon* in the form.
Note: The preferred attachment format is an Excel spreadsheet.
- The customer or Agent must provide SCE with a written request for customer information or action to be taken. The written request must identify in detail the specific information that SCE shall release and/or the specific functions SCE is to perform. In lieu of a separate email, use the same *attachment icon* to upload a file providing the written request. You can include the written request in the same file as the list of service accounts or upload an additional file.
Note: Failure to attach the written request will halt the data fulfillment process until the written request is received.
- Each service account number listed must include its service account address. The service account address must match the address on record in SCE's billing system. If the service address does not match what is on record in SCE's system, the CISR will be rejected and a new CISR will be required.
- The service account number starts with a 3 and has a maximum of 10 digits, including the leading 3. (e.g., 3-XXX-XXXX-XX) *Note: Please exclude dashes when entering the SA number on the CISR.*

INFORMATION, ACTS, AND FUNCTIONS AUTHORIZED

Through the CISR, an SCE customer may authorize an Agent to receive information and/or act on their behalf to perform the specific acts and functions listed below. The SCE customer should enter a capital "X" inside all applicable check boxes for each item they wish to authorize.

Note: SCE will provide standard customer information without charge up to two (2) times in a twelve (12) month period per service account. After two (2) requests in a year, the customer may be responsible for charges that may be incurred to process the request.

Listed below are the most common options requested:

- If you wish to request billing information, enter a capital "X" in check box #1.
- If you wish to request interval usage data, enter a capital "X" in check box #5.
- If you enter a capital "X" in check box #3, at least one sub-option is required (e.g. a, b, c, or d)
- If you wish to request a rate change, enter a capital "X" in check box #7.

Note: This action permits an Agent to change a customer's rate; however, any rate requested on behalf of an SCE customer must be submitted on a valid Rate Change Request form (Form CSD-179) and signed by the customer. Form CSD-179 is a contractual agreement between SCE and the customer that holds the customer responsible to perform all requirements of the rate initiated on their behalf.

BASIS OF AUTHORIZATION

- SCE's customer can indicate (selecting and initialing one box only) the duration of this authorization allowing their Agent access to designated type(s) of information or to perform certain functions. Duration of authorization may be either:
 - One-time only; or
 - One year [a twelve (12) month period from the date of execution of authorization]; or
 - For a given period but limited to no more than thirty-six (36) months from date of executed authorization.
- If no time period is designated or clearly specified, the authorization will be limited to a one-time authorization.
- Customers may renew their authorization by submitting a new CISR.

RELEASE OF ACCOUNT INFORMATION

- Indicate how SCE should provide the information requested to your Agent. You may check all that apply. Although the following options are available, e-mail method is preferred, and the e-mail address is required.
 - Hard copy via US Mail, or
 - Facsimile (626) 543-7321, or
 - E-mail
- Note: SCE cannot guarantee the confidentiality of customer information delivered via email*
- SCE does not guarantee the accuracy of rate analyses when usage information is provided by the customer or Agent.

SUBMITTING THIS AUTHORIZATION

- Once the form is fully executed by both parties (SCE customer and Agent), the form is automatically emailed to 3rdparty@sce.com
- Option to download the executed form is available
- Ensure that a written request has been attached to the electronic form using the attachment icon (Refer to Customer Information section above, third bullet)

Note: Failure to attach the written request will halt the data fulfillment process until the written request is received.

QUESTIONS

If you have questions please contact 3rd Party Authorization at Phone: (844) 235-2068, FAX (626) 543-7321, or e-mail: 3rdparty@sce.com

HOURS: Mon. – Fri. 7:00 a.m. – 3:30 p.m.

Explanation of Customer Information Provided

Billing/Usage Includes:

- Usage Data by peak, by month, if applicable
- Default 12 months (includes read date, number of days in billing cycle kW, kWh, KVAR), if applicable
- Revenue (total billed, by peak, by month), if applicable

Basic Meter Data Includes Existing:

- Meter Number
- Make
- Model
- Meter Form
- Potential Transformer (PT) Ratio
- Current Transformer (C.T.) Ratio
- Meter Voltage & Phase
- Billing Constant (Multiplier)

Interval Data

(Available for accounts with interval metering)

- Daily records of 15- or 60-minute kW and kWh
- When there are multiple meters for a single service account, the total usage for all meters will be aggregated

Standard Confidential Information Includes but is not limited to:

- Customer Name
- Service Account Number
- Service Address
- Billing Address
- Rate Schedule
- SIC Code
- Service Voltage
- Meter Number

Number of Requests Provided:

- Information will be provided up to two (2) times within a twelve (12) month period per service account without charge
- More than two (2) requests within a twelve (12) month period, customers may be responsible for charges that may be incurred in order to process the request