



## **Introduction & Definitions Section**

**This Authorization or Revocation of Authorization to Release Customer Usage Information (“Authorization”): (1) authorizes Southern California Edison Company (SCE) 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 SCE’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  
REVOCAION OF AUTHORIZATION TO RELEASE CUSTOMER INFORMATION**

**Please select the action you wish to take:**

- o CREATE A NEW AUTHORIZATION – Please Complete SECTION A - 1, 2, and 3
- o REVOKE AN EXISTING AUTHORIZATION – Please Complete SECTION B (skip to page 5)

**SECTION A: CREATE A NEW AUTHORIZATION – *Must be completed by Account Holder***

**1. Contact Information**

- (A) First Name: \_\_\_\_\_
- (B) Last Name: \_\_\_\_\_
- (C) Business name (if applicable or enter N/A): \_\_\_\_\_
- (D) Title of Signer (if applicable): \_\_\_\_\_
- (E) Mailing Address: \_\_\_\_\_  
Number Street Apt. # City State ZIP Code
- (F) Phone number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_
- (G) Email Address: \_\_\_\_\_

*(The email address you provide here will be used for all transactional emails relating to this Authorization. If you don't have an email address, please indicate N/A.)*

**2. Authorization Period:**

This Authorization is effective upon your execution and authorizes SCE 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 of your loan or lease term].*

**TO CREATE A NEW AUTHORIZATION**

(P) I, \_\_\_\_\_ *[print name of authorized signatory]*, authorize SCE 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 SCE reserves the right, but is not obligated, 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, CFO of a company or City Manager of a municipality)].*

\_\_\_\_\_  
(Q.) AUTHORIZED CUSTOMER SIGNATURE

\_\_\_\_\_  
(R.) DATE

**3. Service and Customer Account Numbers to be Authorized**

**Residential/Multifamily Accounts**

*Please specify the Service Address, Service Account Number, and Customer Account Number for which you are authorizing the Master Servicer, Data Manager and Contractor Manager to access your energy usage data. (The Service Account Number is 10 digits long and begins with the number 3; the Customer Account Number is 10 digits long and begins with the number 2. Both can be found on the top right hand corner on page 1 of your bill).*

(L1) Service Address: \_\_\_\_\_  
Number Street Apt. # City State ZIP Code

(M1) Service Account: 3- \_\_\_\_\_

(N1) Customer Account: 2- \_\_\_\_\_

**Commercial (Non-Residential) Accounts**

*Please list all Service Addresses where you had Energy Efficiency work done as part of your financing agreement. Include all Service Account and Customer Account Numbers for those addresses for which you are authorizing the Master Servicer, Data Manager and Contractor Manager to access your energy usage data. For more than 3 service addresses, please use an additional form. (The Service Account Number is 10 digits long and begins with the number 3; the Customer Account Number is 10 digits long and begins with the number 2. Both can be found on the top right-hand corner on page 1 of your bill).*

(L1) **Service Address#1:** \_\_\_\_\_  
Number Street Apt. # City State ZIP Code

(M1) Service Account: 3- \_\_\_\_\_

(N1) Customer Account: 2- \_\_\_\_\_

(L2) **Service Address#2:** \_\_\_\_\_  
Number Street Apt. # City State ZIP Code

(M2) Service Account: 3- \_\_\_\_\_

(N2) Customer Account: 2- \_\_\_\_\_

(L3) **Service Address#3:** \_\_\_\_\_  
Number Street Apt. # City State ZIP Code

(M3) Service Account: 3- \_\_\_\_\_

(N3) Customer Account: 2- \_\_\_\_\_



#### **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 SCE energy usage data, consisting of your electricity and natural gas usage data, for the property(ies) where you have installed eligible Program measures. Your SCE 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 SCE or your lender, are responsible for ensuring the safety and security of your information.

By signing above you attest that you have read, understood, agree and authorize SCE 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 SCE 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
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 SCE Section B 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 emails regarding this Authorization.

#### **Instructions to submit a new authorization**

**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](http://www.treasurer.ca.gov/CAEATFA/cheef).



SECTION B: REVOKE AN EXISTING AUTHORIZATION

5. Service and Customer Account Numbers to be Revoked

I, \_\_\_\_\_ [print name of authorized signatory], instruct SCE to cease to provide the Master Servicer access to the energy usage data from the designated service accounts in accordance with these terms and conditions.

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 SCE reserves the right, but is not obligated, to verify any revocation of 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, CFO of a company or City Manager of a municipality).].

Residential/Multifamily Accounts
Please specify the Service Address, Service Account Number, and Customer Account Number for which you are revoking authorization for the Master Servicer, Data Manager and Contractor Manager to access your energy usage data. (The Service Account Number is 10 digits long and begins with the number 3; the Customer Account Number is 10 digits long and begins with the number 2. Both can be found on the top right hand corner on page 1 of your bill).
(L1) Service Address: \_\_\_\_\_
(M1) Service Account: 3- \_\_\_\_\_
(N1) Customer Account: 2- \_\_\_\_\_

Commercial (Non-Residential) Accounts
Include all Service Account and Customer Account Numbers for those addresses for which you are revoking authorization for the Master Servicer, Data Manager and Contractor Manager to access your energy usage data. For more than 3 service addresses, please use an additional form. (The Service Account Number is 10 digits long and begins with the number 3; the Customer Account Number is 10 digits long and begins with the number 2. Both can be found on the top right hand corner on page 1 of your bill).
(L1) Service Address#1: \_\_\_\_\_
(M1) Service Account: 3- \_\_\_\_\_
(N1) Customer Account: 2- \_\_\_\_\_
(L2) Service Address#2: \_\_\_\_\_
(M2) Service Account: 3- \_\_\_\_\_
(N2) Customer Account: 2- \_\_\_\_\_
(L3) Service Address#3: \_\_\_\_\_
(M3) Service Account: 3- \_\_\_\_\_
(N3) Customer Account: 2- \_\_\_\_\_

(Q.) AUTHORIZED CUSTOMER SIGNATURE

(R.) DATE



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

**Instructions for customers to revoke an existing Authorization** – Please send the executed Authorization by email to [3RDPARTY@sce.com](mailto:3RDPARTY@sce.com), or by mail to:

Southern California Edison  
3<sup>rd</sup> Party Authorizations  
P.O. Box 800  
Rosemead, CA 91770