



# Energy Data Request Program (EDRP)

## Academic Researcher Request Form Guidance

EDRP requests for customer data for academic research must meet research project requirements directed in the California Public Utilities Commission Decision 14-05-016 and PG&E's requirements for customer privacy and data security. The EDRP request form should include the following information:

### Eligibility:

- An eligible researcher must sponsor the research project:
  1. The researcher is affiliated with a non-profit college or university accredited by a national or regional accrediting agency and the accrediting agency is formally recognized by the U.S. Secretary of Education.
  2. The researcher is a faculty member or is sponsored by a faculty member and the researcher and the sponsoring faculty members are responsible for carrying out the terms of the data release and a non-disclosure agreement.
- The researcher and research project must meet the research protocol requirements set forth in CPUC Decision 14-05-016 (pages 41-43).

### Identify appropriate contacts:

- The university, college or academic institution (collectively, the “institution”) sponsoring staff professor
- The name of the third party and individuals working under the direction of the staff professor who will require access to the data
- Legally authorized representative: The institution’s representative authorized to agree to the terms of the Non-Disclosure Agreement (NDA) on behalf of the institution. This is usually an officer (ie, Comptroller) or an attorney representing the institution.
  - NDAs are sent via a DocuSign email. If an institution’s staff member prefers to receive the DocuSign email in order to forward it to the right party, enter that person’s email in the request form. However, ensure that the remaining contact information is that of the institution’s authorized representative.
  - After the request is accepted and data to be shared is agreed upon, the NDA will be issued for signature.



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### Institutional Review Board:

- The Institutional Review Board (IRB) must approve the project to certify compliance with the protocols as outlined in the Decision to ensure customer privacy and security of the data being requested.
- The request cannot move forward without the approved IRB.
- A letter stating that an IRB review is not required cannot be accepted to fulfill this requirement.

### Research scope and data information:

- The research description should demonstrate that the proposed research will provide information that advances the understanding of California energy use and conservation.
- Provide a detailed description of the research question to be answered and how the research findings will be used.
- Identify a representative customer sample size and geographic areas that meet the research objectives.
  - Sample sizes should not exceed 5% of a particular customer class (i.e., 5% of residential customers)
  - Identify specific ZIP codes, cities, counties or other representative customer characteristics (i.e., not all customers in PG&E's service territory)
- Identify the detailed data elements, and describe how these data will answer the research question.
- Data date range: PG&E will provide historical data up to 7 years in the past.

**Note:** PG&E will provide anonymized IDs so that usage and program data may be matched, but no personally identifiable information (PII) such as names, addresses, or Account IDs is included.

### IT Third Party Security Review:

- An IT Third Party Security Review (TSR) assessment is required to verify IT security protocols prior to delivery of any data.
- If a third party will receive the data, the third party must complete the TSR.
- The TSR assessment request will be sent directly from PG&E's TSR team.

EDRP is a regulatory process that takes about three months, with additional time usually needed for third parties to execute the NDA and complete the TSR process.