

Clean Power Alliance Administrative Policies and Procedures

Policy Title	CPA Protection of Confidential Information Policy		
Policy Number	CPA2018-03	Effective Date:	06/07/2018
Reference:	CPUC Decision 97-10-031		

1.0 Definition of Terms

1.1 California Public Utilities Commission (CPUC)

A regulatory agency that regulates privately owned public utilities in the state of California, including electric power, telecommunications, natural gas and water companies.

1.2 Policy

1.3 Ensuring Customer Confidentiality is Protected

To ensure that all employees protect the integrity of CPA’s confidential information as well as the confidentiality of others, confidential information may not be shared with unauthorized individuals within or outside of the organization and may not be transmitted via email, except where reasonably necessary to conduct CPA’s business or provide services to customers as required by the California Public Utilities Commission (CPUC).

1.4 Procedure

- A. Confidential information cannot be transmitted or forwarded to individuals within or outside of the organization who do not have an authorized need to know the information.
- B. Confidential information cannot be transmitted via email.
- C. Confidential information cannot be posted on CPA’s website.
- D. Employees must lock his/her computer when leaving their computer.
- E. Passwords may not be shared with any person and cannot be stored physically or digitally.
- F. Documents containing confidential information must be secured at all times.

- G. Documents containing confidential information must be shredded when destroyed when no longer used and as per the adopted retention schedule if applicable.
- H. Employees are responsible for any action performed under their user name and password.
- I. Examples of reasonably necessary business purposes include but are not limited to when such disclosure is necessary to:
 - 1. Comply with law, regulation, or court order;
 - 2. Enable CPA to provide services to its customers;
 - 3. Collect unpaid bills;
 - 4. Obtain and provide credit reporting information;
 - 5. Resolve customer disputes or injuries;
 - 6. Communicate about demand response, energy efficiency, energy management, and conservation programs, or
 - 7. In situation of imminent threat to life or property.
- J. Failure to comply with the provisions of this policy and procedure may result in discipline up to and including discharge.

**CLEAN POWER ALLIANCE OF SOUTHERN CALIFORNIA (CPA)
PROTECTION OF CONFIDENTIAL INFORMATION
POLICY ACKNOWLEDGEMENT**

I have read the Protection of Confidential Information Policy and understand its provisions.

I understand that to ensure the protection of the integrity of CPA's confidential information as well as the confidentiality of others, confidential information may not be shared with unauthorized individuals within or outside of the organization and may not be transmitted via email.

I accept responsibility for any action performed under my user name and password, or as a representative of CPA.

I understand that handling and use of confidential information in violation of the Protection of Confidential Information Policy may result in employee discipline, up to and including terminations and/or termination of roles, responsibilities, contracts, or agreements.

By signing this form, I agree to abide by the policy currently in place and I agree to review periodically any changes or modifications. I understand that my regular review of the policy is required. I understand updates to the policy are available online.

Name
(Print): _____

Emp. ID
(If applicable): _____

Signature: _____

Date: _____

Executive Director
Signature: _____

Date: _____

This document will be maintained in CPA's files.