

ATTACHMENT # 3

Release of Customer Personal Information Checklist

(Routed with Contract)

It is the Utilities' policy to implement strong Customer data privacy protections to maintain the trust of our customers. The sharing of Customer Personal Information with an Affiliate should occur only when it is necessary for the conduct of essential business functions.

Before any such Customer information may be shared with an Affiliate this checklist will be completed, signed and an explanation of the business need to release the Customer data will be attached.

The following Customer Personal Information will be shared with <Vendor Name>

(Check all that apply):

1. Names
2. Street addresses
3. Telephone numbers
4. Email addresses
5. Social Security numbers
6. Utility Account numbers
7. Utility Account balances
8. Bank accounts and/or Credit Card numbers
9. Information received during the Customer identity and credit worthiness process
10. Personal identity information provided such as driver's license number
11. Meter interval/usage use data that can be tied to items # 1-8 above
12. Other Customer Personal Information (describe below)

A Division or Section Manager's signature will serve as acknowledgement that they are familiar with both the Utility Privacy Policy and the definition of Customer Personal Information as defined in the Policy. The signing manager is responsible for evaluating the validity of the data sharing request and for limiting the amount of Customer Personal Information shared with the Affiliate to that which is minimally necessary to meet the business objective. In addition, the signing manager is acknowledging that they have confirmed that the data will be used in compliance with the restrictions outlined in the Utility Privacy Policy.

A non-disclosure agreement is required to be signed by the Affiliate before the Customer Personal Information will be provided to the Affiliate and should be included with the Affiliate contract.

Division or Section Manager: _____ Date _____

Title _____