

From: Dowdell, Jennifer  
Sent: 1/27/2012 4:22:42 PM  
To: 'Kahlon, Gurbux' (gurbux.kahlon@cpuc.ca.gov); 'Murtishaw, Scott' (scott.murtishaw@cpuc.ca.gov); 'efr@cpuc.ca.gov' (efr@cpuc.ca.gov); 'Tom, Jonathan P.' (jonathan.tom@cpuc.ca.gov); 'Velasquez, Carlos A.' (carlos.velasquez@cpuc.ca.gov)  
Cc: Cherry, Brian K (/O=PG&E/OU=CORPORATE/CN=RECIPIENTS/CN=BKC7);  
Redacted  
Jacobson, Erik B (RegRel) (/O=PG&E/OU=Corporate/cn=Recipients/cn=EBJ1)  
Bcc:  
Subject: FW: PG&E Mid Cycle bill review

All,

FYI. Below is our communication to MCE regarding the call investigation.

As I mentioned before we have reached out to meet with them (probably next Friday) to discuss the investigation and where we are on solving the Issues List.

Have a great weekend! And please give me a call if you have questions.

Jennifer  
415-516-8347

**From:** Redacted  
**Sent:** Friday, January 27, 2012 1:16 PM  
**To:** Dawn Weisz (dweisz@marinenergyauthority.org); Jamie Tuckey (jtuckey@marinenergyauthority.org)  
**Cc:** Dowdell, Jennifer; Litteneker, Randall (Law); Jordan, Nichole; Miller, Suzy; Redacted  
Redacted  
**Subject:** PG&E Mid Cycle bill review

Dawn and Jamie,

This is to follow up on PG&E's investigation of the 43 MCE customers who opted-out in December 2011 and January 2012 and that had received mid-cycle bills.

**Summary investigation of 43 MCE Customers who opted-out in December 2011, and January 2012**

- PG&E has completed an investigation of the 22 customers who actually contacted the PG&E Contact Center.

- A total of 36 calls were made regarding the mid-cycle bill issue. Several of the customers made multiple calls regarding the issue and are included in the 36 call total. 10 calls were made by these same customers, but did not concern MCE.

- In reviewing the call summaries, PG&E has not found that the customers who called PG&E call centers opted-out due to the billing error. PG&E has found some individual CSRs who would benefit from additional training and is taking action.

### **Customer call overview and actions**

- It appears that confusion about the mid-cycle bill was the reason for most of the calls. However, in speaking to the CSRs, many customers were surprised to learn they were being served by MCE. Either they thought they had opted out originally, or thought that by doing nothing, they would automatically remain on PG&E supply service. Some examples include:

- One Customer believed they had previously opted out and then requested to be opted out during the call...

- Retired PG&E employee thought by doing nothing he would be opted out.

- Three calls reflect a need for additional CSR training

- In one Call, the CSR needed to review the MCE information to better understand their services

- In two calls, the CSR needed to maintain a more neutral position.

- To remediate where more CSR training is needed, PG&E has instituted the following actions:

1. Feedback has been given to CSRs.

2. PG&E is drafting a broader communication to ensure CSRs understand their responsibilities with respect to CCA customers.

3. PG&E has begun reevaluating its Call Guide in Gen Ref to ensure guidance is clear.

- [REDACTED] Attached is a short summary of PG&E's CSR training and practices supporting MCE call escalation

**Investigation of the specific MCE customer who was the subject of MCE's December 12 e-mail**

- [REDACTED] PG&E investigated an individual customer who referenced their contact with PG&E call center in opting-out of MCE service

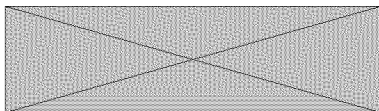
- [REDACTED] PG&E's investigation does not indicate improper action by the CSR who was part of the MCE specialized support team. At the time of the call, the CSR did not know why the mid-cycle bill went out, and said so.

We do understand your concern over the billing error and would be happy to meet with you to discuss our investigation and actions we are taking to ensure PG&E's CSRs are properly trained, calls are properly escalated, and appropriate responses are provided to customers.

Please do not hesitate to call me if you have questions or concerns.

Sincerely,

Redacted



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