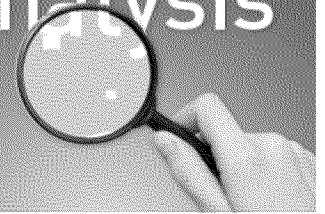




Specific Fact Finding Analysis

Customer Experience Team
Quality Assurance



Redacted

Redacted

Lower, Sausalito

(Calls 1 through 3)

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
1	12/19/11	10:05 AM	1:30	2070C3	Redacted	Fresno

Observation:

CSR [Redacted] greets the customer, [Redacted]. [Redacted] would like to know why she was opted into Marin Clean Energy when she had already opted out. [Redacted] states, "I don't want them to be my provider; I want you guys to provide it." [Redacted] advises [Redacted] she may need to opt out with them, and asks if she had already done that. [Redacted] replies, she opted out once and doesn't know how many times she has to do it. [Redacted] states, "So now I am going to get a bill from them for electric, I guess; and then a bill from you guys for gas." [Redacted] advises [Redacted] that is how it works. [Redacted] expresses her frustration, "Ugh...I hate this, I hate that someone just switches it without any permission. It's wrong." [Redacted] advises [Redacted] [Redacted] he is going to get her over to that department so they can advise what needs to be done. The call is transferred.

Conclusion:

- The customer and CSR did not discuss the delayed billing.

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
2	12/19/11	10:43 AM	16:19	2134C4	Redacted	San Jose

Observation:

CSR [Redacted] greets the customer, [Redacted]. [Redacted] advises [Redacted] she thought she opted out of MEA; however, she has taken care of that part of it. She would like to know if the transmission, distribution, public purpose and extra fees will now be billed separately. [Redacted] seeks agreement from [Redacted] that Marin Clean Energy serves electric. [Redacted] agrees and mentions she believes she was billed twice. [Redacted] verifies the bill [Redacted] has is dated 12/9. [Redacted] advises she received a bill from PG&E 11/28, and found it odd she was billed 901 KWH on both bills. She advises PG&E's charges are from 10/19 through the 31st, and 11/1 through 11/17, and Marin's bill charges from 10/19 through 11/18. [Redacted] asks if she is to pay everybody twice. [Redacted] begins to review the bill. [Redacted] advises she believes something is

wrong since she was charged by both PG&E and Marin Clean Energy for the same time period. Redacted advises Redacted the PG&E bill dated 11/28 is for distribution and transmission. Redacted Redacted interjects advising she paid \$202.53. Redacted agrees, explains the amount paid is for the distribution and transmission and the bill dated 12/9 is Marin Clean Energy's portion. Redacted Redacted asks, "So it costs me \$155 plus \$114 just for electrical last month, \$269? Redacted asks how long she has had Marin Energy as her service provider. Redacted Redacted replies, "They just switched me this month without telling me." Redacted places Redacted Redacted on hold and reaches SSR Redacted Redacted confirms with Redacted the customer is charged by PG&E for distribution and transmission charges only, since she is with Marin Clean Energy. Redacted states she believes customers are unaware when they are with a CCA, that they are charged by us and them. Redacted reviews PG&E's bill dated 11/28 and Marin's portion billed 12/9 to ensure she is correct in regards to how the customer was charged. Redacted Redacted advises Redacted she is correct and the customer pays Marin Clean Energy for their electric. Redacted thanks Redacted and returns to Redacted Redacted. Redacted explains to Redacted Redacted when a customer chooses a different service provider, they are charged by them to provide that commodity; however, since PG&E still distributes the energy they are charged for that as well. Redacted Redacted advises as of 1/18/12 she has opted out; however, she still does not understand why her bill is so high this month. Redacted Redacted mentions she noticed on a previous statement she was charged for both Marin Clean Energy and PG&E charges on one bill. Redacted advises there was an error in the billing which caused customers to receive a second bill of Marin Clean Energy charges which were suppose to be included on the November PG&E billing statement. Redacted Redacted advises she would like someone to check on her bill since it has never been so high. Redacted compares the bill to the previous month. Redacted Redacted and Redacted discuss Marin Clean Energy rates compared to PG&E rates. Redacted Redacted asks why the bills came out separate. Redacted advises there was a problem with the system when the bill was generated. The charges should have been on the same bill; however, due to the error it caused a separate bill to be generated with just the Marin Clean Energy charges. Redacted Redacted mentions she believes Marin Clean Energy rates are lower. The call concludes.

Conclusion:

- If a customer enrolled in the Marin Clean Energy program has questions regarding their bill, please transfer them to the CCA team, Softphone: CCA or use Speed Dial #966. The hours of operation are 24/7.
- Refer to CCO Communications email, Marin Clean Energy (MCE) Billing Issues dated 12/13/11. Advise the customer the delayed bill containing Marin Clean Energy's charges, was due to a PG&E system error.

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
3	12/19/11	11:06 AM	22:15	2264C3	Redacted	Fresno

Observation:

CSR Redacted greets the customer, Redacted Redacted Redacted Redacted is calling to discuss PG&E's rates versus Marin Clean Energy's rates. Redacted provides Redacted Redacted the information requested. Redacted advises Redacted Redacted she has been on the Marin Clean Energy program for awhile;

however, she probably just noticed since she received a second bill of Marin charges which was suppose to be included in her November bill. [Redacted] also explains this due to a PG&E system billing error and continues to discuss the rates.

[Redacted] and [Redacted] begin to discuss the opt out process and the optional transitional period choices Marin Clean Energy offers.

[Redacted] questions why her bill is so high. [Redacted] reviews the average daily usage as compared to last month and last year. [Redacted] and [Redacted] begin to discuss the opt out process, price comparisons, and different types of heater use.

[Redacted] continues to explain [Redacted] bill and the charges included within the bill. Mrs. [Redacted] seems to have no other questions and the call concludes.

Conclusion:

- [Redacted] provides correct information in regards to the billing error involving Marin Clean Energy charges by advising the customer the error was due to a PG&E system error.

[Redacted] – [Redacted] **Belvedere**

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
4	12/18/11	4:48 PM	9:22	2692C1	[Redacted]	Sacramento

Observation:

CSR [Redacted] greets the customer, [Redacted] [Redacted] states, "I got a bill for...it looks like its Marin Clean Energy." [Redacted] answers, "[Redacted] [Redacted] continues, "42.78 but PG& E is the billing party and it says, uh...Marin Clean Energy charges for clean, renewable energy replace PG&E electrical generation charges. PG&E still charges for delivery of electricity to you." [Redacted] agrees, "Correct." [Redacted] "But I opted out of Marin Clean Energy." [Redacted] advises [Redacted] it looks as if notification was sent in regards to being opted in the program. [Redacted] advises he never received the notification. [Redacted] advises he needs to transfer the call to the community choice aggregation dedicated team so that they can address his questions.

[Redacted] reaches [Redacted] and they discuss the Marin Clean Energy opt out process. [Redacted] advises [Redacted] the customer must opt out of the program with Marin Clean Energy. [Redacted] also shares with [Redacted] there was a PG&E billing error that caused two separate bills to generate, one which included PG&E charges and the other included just Marin Clean Energy's portion. These charges were supposed to be billed on one bill, the November statement. [Redacted] also mentions if the October bill was to be reviewed, it would show Marin Clean Energy's charges as well, since he has been on the program the whole time. [Redacted] guides [Redacted] where to find Marin Clean Energy's phone number in General Reference and advises [Redacted] to provide the customer with their phone number, should they choose to opt out.

[Redacted] returns to [Redacted] and advises him to contact Marin Clean Energy. [Redacted] provides their phone number and the call concludes.

Conclusion:

- The customer and CSR did not discuss the delayed billing.
- The customer believed he had already opted out of MCE.

Redacted

Redacted

Tiburon

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
5	12/19/2011	10:26 AM	18:10	2264C3	Redacted	Fresno

Observation:

Redacted is calling after receiving his bill showing a balance of \$741.12 with a prior balance of \$615.64 and is curious as to why his bills are as such. CSR Redacted authenticates the customer and explains he was defaulted into MEA after he did not respond to MEA's opt out letters. She adds the reason for this additional charge was due to a billing error on PG&E's system where the MEA charges were not added to the first bill. Redacted explains he had already paid the first bill of \$615.64 and wanted to know if this had been posted. CSR Redacted explains his payment crossed paths with the second bill (MEA charges) and indicates the only balance owing at this time is \$125.48. Redacted then asked if there was a way Redacted would be able determine who would be cheaper, PG&E or MEA. Redacted responds that she would be able to assist. She reviews the account and identifies the gas consumption is the contributor to his high bills. Redacted explains it is due to his heated swimming pool and his wife needs this due to her medical condition, Fibromyalgia. Redacted explains he may qualify for PG&E's medical program and sends him the application.

She recalculates the electric charges for the last billing cycle and explains if he was a full service PG&E customer his electric bill would have been \$233.51 compared to the unbundled MEA charge of \$292.72 (a difference of \$59.21). Redacted asks how he can return to PG&E. Redacted explains he would need to contact MEA and request to opt out. In addition, she provides Redacted with the timeline and the options of charges to return to PG&E bundled service (6 month transitional period with charges at Spot Market or stay with MEA for the duration). He asks what her recommendation is and she responds it is up to him to decide. She explains with the Spot Market price, there is no way to determine what the next 6 months of charges will be and if he stayed with MEA, he would know what those charges are. Redacted explains he wants the Spot Market price and Redacted indicates he would need to provide these details to MEA. They then begin to discuss the medical program in further detail. Redacted provides the direct line to MEA and thanks Redacted for calling. The call concludes.

Conclusion:

- The CSR indicated the delayed bill was a result of an error in PG&E's billing system.
- The CSR was very thorough in her explanation of the PG&E / MEA billing issue ensuring the customer had a good comprehension.
- The CSR was very professional and remained neutral, providing only the facts, allowing the customer to make an informed decision.

Redacted - Redacted **Tiburon**
(Calls 6 through 9)

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
6	12/19/2011	7:21 AM	5:44	2635C1	Redacted	Sacramento

Observation:

Redacted Redacted is calling after receiving her bill stating she had a 3rd party energy charge from MEA. She adds that she has never received these charges before and that she had previously opted out of MEA. CSR Redacted authenticates the customer and reviews the account. He explains she has been paying MEA for her electricity since September and these charges are normally combined into one bill, however, the November bill had the MEA charges billed out separately. Redacted Redacted is confused since she reiterates she had previously opted out of MEA. Redacted adds he will be transferring her to a CCA rep that will be able to assist her further into this matter. She understood and the call is transferred.

Conclusion:

- The customer believed she had already opted out of MCE.
- The CSR processed the transaction accurately by providing as much basic MEA information available to him and by transferring the customer to the CCA line for further assistance.

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
7	12/19/2011	7:28 AM	3:18	2052C1	Redacted	Sacramento

Observation:

Redacted Redacted explains she just spoke to a rep about her MEA charges and indicates she had previously opted out. She adds she received a separate bill this month detailing the MEA charges and based on her discussion with the prior rep, which he had advised her MEA charges began in September, she did not see these charges. CSR Redacted advised her to contact MEA directly to opt out. She responds she had done this when she originally received notification of MEA by contacting PG&E. Redacted responds the opt out conversation she had with a PG&E representative was not honored since she resides in a CCA area and we were required to set her up with MEA. He explains, in order to opt out of MEA she would need to contact them directly either by phone or online. She asks if she could opt out now and Redacted indicated she would be able to after speaking with MEA. Redacted Redacted states, "It's sneaky. I don't like it. It's like I'm being forced to swallow a bad pill that I don't want to. I guess I didn't pay attention when the opt out didn't work or they took it back or whatever. Alright, I will call them." Redacted responds they are open at 9 am and thanks her for calling. The call concludes.

Conclusion:

- The CSR did not address the PG&E billing issue causing the MEA charges to be billed on a subsequent statement; however, the customer's main concern was how / why she was

enrolled into MEA after she had previously opted out and what she would need to do to opt out again.

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
8	12/19/2011	3:57 PM	6:08	2445C1	Redacted	Sacramento

Observation:

Redacted is calling back indicating she just spoke to MEA and had requested to opt out. Note: She explained she had opted out before and was under the assumption she had full service with PG&E until the recent billing issue caused the MEA charges to be billed as a separate bill. CSR Redacted authenticates the customer, validates the telephone number and reviews the account. He asks if they were able to process the opt out. She responds they were but was advised she may continue to receive bills including their charges for another 1 to 2 billing cycles. Redacted explains she will default to us once the process is complete. Redacted states she was provided with a date in January by MEA to return to PG&E.

She then changes the topic and discusses the heater issue and medical program her husband had previously called in for. Redacted provided additional details about the medical program and the customer understood. He thanks Redacted for calling and the call concludes.

Conclusion:

- The customer had opted out of MCE prior to this call
- The CSR processed the transaction accurately.

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
9	1/6/2012	2:19 PM	3:40	2050C1	Redacted	Sacramento

Observation: (Account # 7164247617)

Redacted is calling after receiving a bill for almost \$1000 where she believes she has already paid a portion of. CSR Redacted authenticates the customer and reviews the account. He provides the customer with her payment and billing history. She then inquires if she needs to continue to pay the MEA charges since she had previously opted out in December. Redacted explains these charges must be paid until she transitions back to PG&E for full service. He recommends Redacted contact them next week for further details and provides the direct line. Redacted thanks her for calling and the call concludes.

Conclusion:

- The customer had opted out of MCE prior to this call
- The CSR processed the transaction accurately

Redacted

Tiburon

(Calls 10 through 11)

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
10	12/10/2011	9:16 am	1273	2035c1	Redacted	Sacramento

Observation:

Redacted explains he received a paper bill with a different amount than the amount shown online and he wants to know why. Redacted CSR, begins by adding Redacted to the account with Redacted's permission. Redacted provides the current balance of \$342.51 but Redacted see a balance of \$288.

Redacted tells him there was a second bill from MEA for Redacted and Redacted appears not to understand why he has a different energy provider. Redacted explains that PG&E bills the distribution and transmission but the energy charges come from MEA. Redacted wants to know if he has to be with MEA. Redacted says she does not know why the bills were separately but that he has the options to return to PG&E service.

Redacted asks what "CRS" means so Redacted explains that CRS stands for Direct Access Cost Responsibility Surcharge. Redacted states that the Opt out period has ended but Redacted questions when he received this information because he just moved in from out of state. After reviewing the account, Redacted asks Redacted if she can place him on hold to check with a supervisor to ensure she provides accurate information.

Redacted comes back on the line and advises Redacted she will transfer him to CCA line but Redacted wants to know about PG&E rates. Redacted provides the tiers rate information. Redacted says he used 517 kwh on his last billing. They then discuss baseline and the blue bill line items. Redacted defers to the CCA Specialty line stating they can answer his questions regarding bill.

Conclusion:

- The CSR did not place blame for the delayed billing on MCE or PG&E.
- The CSR answered the customer's questions and transferred the customer correctly.

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
11	2/10/2011	9:37 am	983	2239c3	Redacted - SSR	Fresno

Observation:

Redacted tells Redacted, SSR, that he has billing questions. Redacted explains that the CCA Specialty line is closed until Monday but she will try to answers his questions. Redacted wants to know the breakdown of his bill. Redacted tells him he is receiving his energy from MEA.

Redacted tells Redacted that MEA information distributed this summer but Redacted counters that they just moved in. Redacted explains that he was automatically enrolled in MEA and she does not know if they have an opt-out program, therefore he would have to contact them directly.

Reda requests the MEA phone number and then a comparison of PG&E charges versus MEA charges. Red tells Redac that PG&E's rates found on the PG&E's website. Red provides the baseline and over baseline rates and then asks Redac to review his bill to compare. Reda states she does not know which rates MEA is using and he needs to check with them. Redac states, from the information provided that he is paying more with MEA. Red cautions him to check with MEA before making that determination. Redact is reviewing the MEA website during the call.

Reda explains Redac is reviewing the same bill that includes both MEA and PG&E charges. Reda clarifies that PG&E's charges were billed, then about a week later, the MEA charges were added in. Redac has several questions about his gas charges that Reda answers. Red explains the recommended thermostat settings because the Redac is setting his heater higher. Redact asks about alternative gas providers and Reda explained he could find them by the internet.

Conclusion:

- The SSR did not place blame for the delayed billing on MCE or PG&E.
- The SSR answered all the questions and remained neutral when discussing CCA information.

Redacted **Dillon Beach**
(Calls 12 through 13)

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
12	12/20/2011	1:25 pm	293	2161c1	Redacted	Sacramento

Observation:

Redacted is calling questioning his bill. Redacte says he received information about MEA but ignored it because he wants to remain with PG&E. Redacted is surprise to learn he is with MEA as of October. Redacte states he never wanted to switch because he receives a discount as a retired PG&E employee. CSR, Redac tells Redacte his BPP (Balance Payment Plan) has changed due to fact that MEA charges are not included in BPP. Redacted has questions about the changes but Reda tells Redacted that she will transfer him to a dedicated CCA Line and then does so.

Conclusion:

- The customer was unaware he was with MEA.
- The CSR followed the correct procedure because she answered the customer's general questions and then transferred the customer to the CCA line.

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
13	12/20/2011	1:31 pm	834	2491c3	Redacted	Fresno

Observation:

Redacted retired PG&E employee, explains that he lives on the borders of Marin County. He does not know why his bills have increased. He received a bill for \$143 and paid it then received another bill for \$235.40 and wants to know why.

Redacted CSR tells him that he received a PG&E billing, a MEA billing then received a combined bill for \$235.40. Redacted wants to know why he is with MEA when he opted out earlier. Redacted says he was not informed about the switch. Redacted tells him the voters passed a referendum therefore his account was switched to MEA if he wanted to opt out he needed to call and then provides the MEA phone number.

Redacted discuss how complex the MEA issue has been. Redacted is upset that he has to make additional calls to resolve his issue and switch back to PG&E. Redacted asked how much his bill was before he switched to MEA and Redacted provides that information. Redacted summarizes that he will pay the difference in the billing and call MEA to resolve his issue.

Conclusion:

- The CSR did not place blame on either PG&E or MEA for the delayed billing.
- The customer believed he had previously opted out of MEA.
- The CSR addressed the customer’s concerns and completed the call correctly.

Redacted Tiburon

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
14	12/21/2011	2:32 pm	531	2272c3	Redacted	Fresno

Observation:

After greeting the customer, Redacted the CSR, asks Redacted if she has a clear understanding of MEA, then he offers to provide a brief background. Redacted explains that as of February 2010, the Marin board decided to generate its own electricity and enrolled all residents into the program and if anyone wanted to opt out, they needed to contact MEA.

Redacted asks if MEA rates are higher because her bill has never been this high before and Redacted says, “From the history and in speaking to other customers in similar situations, yes, their rates are higher.” Redacted offers to provide what her bill amount would be if she had been with PG&E. Redacted tells Redacted was enrolled in MEA in August of 2011.

[Redact] analyses the current bill and tells [Redact] her electric charges were \$437.28 with MEA and would have been \$356.66 with PG&E a difference of \$86.62. Given the information provided, [Redact] decides to opt out of MEA and [Redact] provides the MEA phone number.

[Redact] explains after the grace period then [Redact] will have to go through a transitional period before she can switch back to PG&E. [Redact] tells her MEA will review her options. [Redact] has the option to stay with MEA or pay a transitional spot market rate and unfortunately the transitional spot market rate fluctuates. [Redact] says her grace period ended on November 9. [Redact] tells her it is her option to stay with MEA or go with spot market rate and provides the current market rate. PG&E's electric rates are comparable with spot market rates but MEA's rates are higher.

[Redact] asks what type of energy Marin is generating and why their energy is cleaner. [Redact] says he thinks they are using hydropower generation and tells [Redact] to ask when she calls them. [Redact] and [Redact] agree that the energy charges are high and [Redact] adds, "Yeah, it is and \$86 adds up and that's only for this month."

[Redact] provides the MEA phone number and she states she will call them and the call concludes.

Conclusion:

- The CSR and customer did not discuss the delayed billing.
- The CSR should present the facts and remain neutral when discussing MEA.

[Redacted] **Belvedere**
(Calls 15 through 16)

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
15	12/14/2011	10:06AM	5:23	2814C1	[Redacted]	Sacramento

Observation:

[Redacted] is calling to say, "I wasn't sure when I ended up with Marin Clean Energy. Did that just happen automatically...as opposed to just PG&E?" CSR [Redact] replies, "In your area...if you are in Marin's area it would happen automatically." [Redacted] asks, "Could I just opt out of that?" [Redact] says he believes so and advises, "You would have to opt out with Marin if I'm correct." [Redact] explains we have a specialty department who can give him more information. [Redacted] attempts to find the CCA phone number to provide [Redacted] before the call is transferred but he could not locate one.

Conclusion:

- There was no discussion of the delayed billing.
- The CSR transferred the customer over to the CCA line to handle his inquiries.

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
16	12/14/2011	10:13AM	10:44	2329C3	Redacted	Fresno

Observation:

Redacted is calling because on his bill he can see he is with Marin Clean Energy. CSR Redacted asks if Redacted is new to the Marin County area and Redacted replies no. Redacted asks when he switched over and if this was done automatically. Redacted advises it is automatic, was completed in phases and his phase was on 8/19/2011. Redacted and Redacted discuss transitional bundled rates, generation costs and PG&E rates. During this discussion, Redacted asks if he will need to contact MEA to opt out and Redacted confirms.

Conclusion:

- There was no mention specifically of the delayed billing.
- The customer was not aware he was with MEA.
- The CSR advised the customer will need to contact MEA to opt out.

Redacted **Mill Valley**

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
17	12/23/2011	1:37PM	6:42	2002C4	Redacted	San Jose

Observation:

Redacted is calling to find out how much she owes on her solar bill. While discussing her solar bill Redacted inquires about the \$197.13 electric generation charges. CSR Redacted responds, "That's your electric portion because you're with...I'm assuming this is Marin Clean Energy...is this Marin...yes it is." Redacted replies, "Yeah it's Marin but I'm with PG&E." Redacted explains, "Well PG&E actually delivers the energy...we transmit and...we're the distributors for the energy but you're actually purchasing your energy from Marin and that's what you see there as the charge." Redacted replies, "Oh I thought we opted out of that so we weren't gonna have to pay these charges..." Redacted responds with, "It doesn't show that you were...did you opt out directly through Marin?" Redacted says, "Yeah, when they first came out." Redacted explains, "They enrolled you...because they have here Marin as your service provider and that's why you're seeing that charge." Redacted comments on how she feels this negates her having solar. Redacted continues to say, "They're billing you for the amount of energy that you use so regardless if you're buying it from Marin or PG&E, it's still energy that you would have used because your system did not produce enough. What it's doing though, it's billing you for that on a monthly basis not on a true up basis...because they basically want you to get paid every month."

Redacted and Redacted discuss her solar billing further and then Redacted asks, "If we wanted to opt out of Marin Clean Energy again which we said right from the start we did not want to be part of that and I don't know how they enrolled us...can we still do that?" Redacted advised, "You still can." Redacted then asks for the phone number to call. While Redacted is looking for the number, Redacted asks if there is an

advantage to being with them. [Redacted] responds with, "Um...I mean they're still delivering energy...I'm not familiar with their rates...I don't even know if their rates are cheaper or more expensive...I honestly don't know." [Redacted] provides MEA's phone number and the call concludes.

Conclusion:

- There was no mention specifically of the delayed billing.
- The CSR advised the customer will need to contact MEA to opt out and provided their phone number.
- The customer was not aware she was with MEA. The customer thought they had previously opted out.

[Redacted]

Mill Valley

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
18	12/29/2011	1:45PM	6:28	2561C4	[Redacted]	San Jose

Observation:

[Redacted] is calling because he spoke to someone earlier, was directed to Spark Energy and then was referred back to us. He continues to say he keeps getting billed for Marin Clean Energy even though he did not sign up for it and asks CSR [Redacted] to take it off his bill. [Redacted] explains Marin Clean Energy is a separate utility and charge for the amount of usage consumed while PG&E charge for the transportation and distribution. While [Redacted] is checking to see how the customer can opt out, [Redacted] comments how he thought he completed this 6 months ago. [Redacted] consults with an SSR on what action to take and the SSR advises he should be transferred over to the CCA line. [Redacted] returns to [Redacted] and explains she will be transferring him over to our specialty line to handle his request.

Conclusion:

- There is no discussion related to the delayed billing.
- The CSR transferred the customer over to the CCA line to handle his inquiries.

[Redacted]

Sausalito

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
19	1/3/2012	9:59AM	24:38	2264C3	[Redacted]	Fresno

Observation:

Female customer is calling to get information for the transitional rate from Marin Energy back to PG&E. She advises her and her husband were not aware their account switched to Marin Clean Energy until recently. She provides her name as [Redacted] Sausalito. CSR [Redacted] asks if she has contacted Marin to opt out and [Redacted] advised no. [Redacted]

explains she spoke to someone about opting out but since they could not provide her with much information, she wanted to speak to us.

Redacted would like to know why they would have to go on a transitional rate back to PG&E when they did not request to be switch. Redacted advises she was automatically enrolled and she would have needed to take action if she didn't want to be enrolled. Redacted also advises she will need to contact MEA to opt out, reviews the timeline and the options of charges to return to PG&E bundled service (6 month transitional period with charges at Spot Market or stay with MEA for the duration).

At the end of the conversation, Redacted advises she will contact MEA to opt out.

Conclusion:

- There was no mention specifically of the delayed billing.
- The CSR advised the customer will need to contact MEA to opt out.
- The customer was not aware she was with MEA until recently.

Redacted **Tiburon**

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
20	01/03/2012	10:37 AM	544	2112 C3	Redacted	Fresno

Observation:

Redacted called wanting to know why his bill tripled from November to December. He said he was referred to PG&E by MCE. CSR Redacted examined the December 9th billing he is inquiring about has the Marin Clean Energy charges and is a delayed bill from his December 2nd billing. Redacted then advises Redacted the two bills should have been combined and then provides him with the total for the two bills. Redacted wants to know what the bill would have been if he was not with MCE and Redacted calculates the bill for him. Redacted notes it would have been about \$80 less expensive for him if he were with PG&E alone and asks how he would go about opting out of MCE. Redacted advises Redacted he would need to contact MCE in order to opt out.

Conclusion:

- The CSR does not place blame for the delayed billing on either MCE or PG&E.
- The customer feels MCE is more expensive and wishes to opt out for that reason.

Redacted

Sausalito

(Calls 21 through 22)

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
21	01/05/2012	2:49 PM	583	2208C3	Redacted	Fresno

Observation:

Redacted wants to know why her bill is so high. As CSR Redacted is advising her of the recent billings, Redacted questions the December 9th bill and wants to know why it came out then. Redacted advises that billing included the charges for MCE. Redacted interrupts and asks, "What the hell is that?" Redacted explains in certain areas customers are billed for the generation portion of their bill by a CCA while we still charge for transmission and distribution. Redacted wants to know how long she has been with MCE; Redacted checks and determines Redacted has been with MCE since August. Redacted asks if they are stuck paying a "double fee" or can they switch. Redacted says Redacted can contact MCE to opt out if she chooses. Redacted is upset that she was placed on MCE without her knowledge. Redacted asks for the MCE phone number and expresses to Redacted she is not going to pay the MCE portion because she felt it was forced on her and it isn't right. Redacted provides the MCE phone number. Redacted continues to express dissatisfaction about not being notified of the change. Redacted states most customer received notification and advises Redacted she should have received multiple notifications to opt out.

Conclusion:

- The CSR is not CCA trained and should have transferred the call to the CCA line. The CCA reps could have explained to the customer she was not paying a "double fee" and a generation charge would have been added to the bill regardless of whether it was charged by MCE or PG&E.
- The CSR does not place blame for the delayed billing on either MCE or PG&E.

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
22	01/05/2012	3:06 PM	1485	2639C3	Redacted	Fresno

Observation:

ECI – customer advised she had already opted out of MCE.

Conclusion:

- Customer had opted out of MCE prior to this call

Redacted

Sausalito

(Calls 23 through 24)

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
23	01/04/2012	11:38 AM	577	2806C1	Redacted	

Observation:

Redacted calls because he is confused about his bill. While discussing when the bills came out, CSR Redacted advises Redacted the December 9th bill was for his Marin Clean Energy charges. Redacted wants to know what that is. Redacted advises Redacted he is getting his electricity through MCE. Redacted asks why and if he approved it. Redacted advises she can transfer Redacted to the CCA group to discuss this. Redacted goes on to say he's never talked to anyone regarding this. Redacted says she believes he would have to opt out with MCE. Redacted asks what the difference is in rates and Redacted says she doesn't know and refers him to the MCE phone number on his bill. Redacted questions why he should be responsible for those charges when he didn't request to be with MCE. Redacted again says she can transfer Redacted to the group who handles these calls and Redacted accepts.

Conclusion:

- The CSR did not specifically place blame for the delayed billing on either MCE or PG&E.

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
24	01/04/2012	11:49 PM	657	2423C3	Redacted	Fresno

Observation:

Redacted wants to know why he is now paying MCE when he did not ask to switch. CSR Redacted advises him of the process and advises he would have been notified multiple times for the chance to opt out. Redacted wants to know if the rates are about the same as PG&E. Redacted lets him know she can tell him the rates for Redacted but he would need to check with MCE about their rates. When he again asks about the rates Redacted offers to tell him the PG&E generation rate and allow him to compare that to his bill. Redacted provides the PG&E generation charge for the different tiers. Redacted asks how he can get rid of "...this so-called third party?" Redacted advises he would need to contact MCE in order to opt out. Redacted says he sees the phone number for MCE on the bill. Redacted wants to know if he can opt out and Redacted says, based on how long he's been with MCE he could opt out but would either need to stay with MCE for six months or he could opt out immediately and would be charged the transitional bundled rates. Redacted says he wishes he just could have stayed with PG&E and he is going to call MCE. The call concludes.

Conclusion:

- The customer and CSR did not discuss the delayed billing.
- The customer was unaware he was with MCE asked how to return to PG&E.

Redacted

Sausalito

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
25	01/04/2012	11:13 AM	347	2454C3	Redacted	Fresno

Observation:

Redacted calls and says she sees on her most recent bill that she is being billed for Marin Clean Energy. She says she did not sign up for this and wants to know what is going on. CSR Redacted advises Redacted "You didn't need to sign up; you only needed to opt out." Redacted tells Redacted MCE sent out letters informing customers of the change and letting them know how to opt out. Redacted Redacted says, "So, you mean I was slammed on this." Redacted says no and begins to explain but Redacted Redacted asks for a moment and steps away from the phone. When Redacted comes back she says she believes MCE rates are higher than PG&E. Redacted says she cannot comment on that but can provide our rates so Redacted can compare. Redacted Redacted advises for information regarding MCE she will have to refer Redacted to MCE. Redacted continues to voice her unhappiness over the manner in which she came to be on MCE. Eventually Redacted asks how she can opt out and Redacted advises her of the process.

Conclusion:

- The customer and CSR did not discuss the delayed billing.
- The customer was unaware she was with MCE asked how to return to PG&E.

Redacted

Tiburon

(Calls 26 through 28)

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
26	12/15/2011	9:40 AM	1020	2204C4	Redacted	San Jose

Observation:

Redacted is calling with a question on his account. He is trying to figure out what he owes because there are two payments scheduled for two different dates through My Energy. CSR Redacted says that there are two different billings because he has Marin Clean Energy. She states there was a problem with the billing for Marin Clean Energy and searches for the information to provide Redacted Redacted with the details.

Redacted tells Redacted that there was a billing error for the November billing cycle. She explains that normally all charges appear on one bill but in November one bill came out on November 28 and the other came out on December 9. Redacted asks what was on the November 28 bill. Redacted explains that the November 28 bill was PG&E charges and the December 9 bill is the Marin charges.

Redacted asks if he has the opportunity to opt out because he thought he did. Redacted tells him he can still opt out. Redacted asks if the charges on the December 9 are going to be the normal charges (roughly) Redacted tells him it varies and gave an example by comparing the month before. Redacted clarifies that he thought Marin Clean Energy was something that he had to opt in for but it looks like he has to opt out and asks for information on how to opt out. Redacted advises Redacted he will need to contact Marin Clean Energy and provides him with the phone number.

Redacted then asks about a low electrical wire that is running from the street to his house for work being done to move the lines from overhead to underground; he feels this is unsafe. Redacted issues a Field Order to have the wire looked at.

Redacted asks to confirm the amount due on his account. Redacted explains the November 28 amount will be paid on the December 19 and the amount on the December 9 (the MEA charges) bill will come out on December 30.

Conclusion:

- The CSR did not state either way who was responsible for the delayed billing of Marin Clean Energy charges.
- The CSR remained neutral and answered the customer’s questions regarding his bill.

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
27	1/4/2011	11:23 AM	235	2889C1	Redacted	Sacramento

Observation:

Redacted is calling with a question about the bill he just received online. Redacted explains last month he got a bill from Marin Clean Energy and this month he is getting a bill for an electric generation charge that was not there before. He says he is trying to figure out why his bill is so high all of a sudden. CSR Redacted says there should be generation charges on every bill but the last bill he received was only for Marin charges and not PG&E charges, which is why he is not seeing the generation charges. Redacted explains to Redacted he has to look at the detailed breakdown of charges.

Redacted asks for an explanation of why the bill is so much higher, so Redacted advises him he will transfer him to the department that can provide him with the answers he needs.

Conclusion:

- Since the customer had a billing inquiry, the CSR appropriately transferred the customer to the CCA specialty line.

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
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28	1/4/2012	11:26 AM	929	2454C3	Redacted	Fresno
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Observation:

Mr. Schmidt explains why he was transferred and provides CSR Sara with his account number. Mr. Schmidt explains to Sara that he is looking online and is trying to find out why his bill is so much higher this month. He mentions the line item "Electric Generation Charges" on the December 28 bill that was not there on the previous bill.

Sara explains generation is now being provided by Marin Clean Energy's charges and those charges appear on our bill. She explains that we failed to bill their charges on the November bill and we generated an off-cycle bill on December 9 to bill for their charges. She explains the total bill amount for November should have been \$381.90. Sara walks Mr. Schmidt through My Energy to help him find the detailed statement view (paper copy view) of his most current bill so she can walk him through the billing statement.

Mr. Schmidt asks if he still has the option to opt out. Sara explains he does have the option to opt out. She explains the two options available for opting out of MEA. Mr. Schmidt states that most likely the PG&E rate will be less than the MEA rate. Sara advises Mr. Schmidt that is a hard question to answer because she must remain neutral. She explains he can review his bill to see the difference between the two charges because our charges are on the bill as well as MEA's charges. Sara provides Mr. Schmidt with the fixed generation rate and the spot market rate. Mr. Schmidt asks, for clarification, if he comes back to PG&E immediately then for six months he would pay the spot market rate. Sara confirms this is correct.

Mr. Schmidt is still concerned about the amount of his recent bill, so Sara attempts to try to help Mr. Schmidt understand the usage and amount of the bill. Mr. Schmidt asks for the number to Marin Clean Energy. Sara confirms he will need to call them to opt out, provides him with the phone number and his electric service ID number and the call concludes.

Conclusion:

- The CSR advised the customer PG&E failed to bill Marin Clean Energy charges on the November bill.
- The CSR very thoroughly answered the customer's questions regarding Marin Clean Energy in a neutral manner.

Redacted

Sausalito

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
29	1/3/2012	11:10 AM	1324	2454C3	Redacted	Fresno

Observation:

Redacted is calling with a question on her bill. CSR Redacted obtains her account number and asks how she can help. Redacted explains her bill is much higher than normal and says she called MEA but they advised her to talk to PG&E. Redacted says her gas usage is lower this year over last year and she is not sure how to read the electric bill. She says generally her charges during the winter are between \$350 & \$400 but this year it is over \$600.

Redacted reviews the account. Redacted explains to Redacted that she has had MEA for quite some time and then goes into the usage amounts she has used and compares recent usage to historical usage. Redacted explains a portion of the total balance reflected on the December 22 bill was for the prior bill for Marin's charges. Redacted asks if the charges would be about the same if she was solely with PG&E. Redacted explains they would be close and that she could provide her with our rates so Redacted can compare them to Marin's rates.

Redacted asks what generation means and Redacted explains this. Redacted then provides Redacted with PG&E's generation rates and explains where she can find the rates for Marin Clean Energy on her bill. Redacted states that it appears PG&E's rates are lower in tier 3 and 4 than Marin Clean Energy and asks how she could ever be in the fourth tier. Redacted explains the usage for the billing cycle. Redacted and Redacted continue to discuss historical usage data.

Redacted again points out that our rates are cheaper in tier 3 and tier 4 and asks if it makes sense to opt out of Marin Clean Energy. Redacted advises Redacted that she must remain completely neutral and the decision must be made by her. She explains she can provide the rates so she can compare but ultimately she must decide. Redacted explains the two options for opting out if she wishes to do so. Redacted asks what moves the rate up and down if she opts out immediately since the spot market rate is not tiered. Redacted explains the reason for rate fluctuation with spot market rates and provides an example.

Redacted asks about baseline and who decides it. Redacted explains baseline and provides Redacted with her winter and summer allotments. Redacted says she will discuss the issue with her husband and asks how she would opt out if she chooses to. Redacted explains she would have to call Marin Clean Energy to opt out.

Conclusion:

- The CSR did not state either way who was responsible for the delayed billing of Marin Clean Energy charges.
- The CSR very thoroughly answered the customer's questions regarding Marin Clean Energy in a neutral manner.

Redacted

Tiburon

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
30	1/5/2012	1:27 PM	730	2639C3	Redacted	Fresno

Observation:

Redacted is calling because she was looking at her bill and has been pondering whether or not she wanted to opt out of Marin Clean Energy. She says she wants to have her bill the way it was (she is choosing to opt out of MEA). She says she called MEA and they provided her two options for opting out and advised her to call PG&E to find out the rates for the two different options. CSR Redacted interrupts Redacted and explains she would want to return immediately because that is the better option. She explains the spot market rate is a fixed rate, so customers can come off ahead during the six month time frame after opting out of MEA.

Redacted asks if we are getting a lot of calls on this and Redacted says we are. Redacted expresses some frustration regarding MEA and the size of her current bill. Redacted reviews the historical bills on the account and explains that the bills when Redacted was a bundled PG&E customer averaged around \$250, much less than the current bill with Marin Clean Energy charges. Redacted and Redacted have a discussion about deregulation. Redacted explains how Marin Clean Energy came to be. Redacted expresses frustration with the amount of her bill now that she is with Marin Clean Energy. Redacted; and Redacted go over usage and heater settings and the call concluded.

Conclusion:

- The CSR advised the customer that opting out immediately would be the best option and explained the difference between spot market rates and fixed tiered rates; however, this did not seem to be the deciding factor for the customer opting out. The customer had called with questions regarding the two opt out options because she had already decided to opt out.

Redacted **Sausalito**
(Calls 31 through 32)

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
31	12/27/2011	2:57PM	10:26	2691C1	Redacted	Sacramento

Observation:

Redacted receives two bills for his account and calls to question why. CSR Redacted advises Redacted that MCE charges are not included in the initial November billing. Redacted transfers the call to a CCA CSR for assistance.

Conclusion:

- Redacted did not place blame on either PG&E or MCE.
- The customer was not advised his call was being transferred to a CCA representative. Redacted Redacted completed a warm hand-off after waiting five minutes in queue.

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
32	12/27/2011	3:07pm	7:00	2329C3	Redacted	Fresno

Observation:

(This is the call transferred to a CCA CSR.)

Redacted advises CCA CSR Redacted he did not know he is still an MEA customer and questions how he can opt out. (He believes he's already opted out but has been re-enrolled with MEA.) Redacted provides the process details. During this call, Redacted does not question why he's received a separate bill for MEA's charges.

Conclusion:

- Geraldo accurately addressed Harley's inquiry.

Redacted

Belvedere

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
33	1/3/2012	11:58am	27:01	2599c1	Redacted	Sacramento

Observation:

Redacted calls to question his bill. He notices "large charges" for Marin Clean Energy and believes it is a mistake. When questioned whether he's contacted MCE, he replies he has not. Redacted believes he's opted out from MEA and has received a letter from PG&E confirming this. Redacted questions whether PG&E's charges are less expensive than MCE and CSR Redacted attempts to address the inquiry. While Redacted is on the call with the PG&E CSR, his wife is on the phone with Marin Clean Energy and advises them she wants to opt out. * The November billing issue is not brought up during this transaction.

Conclusion:

- The CSR and customer did not discuss the delayed billing.
- The customer believed he had already opted out of MCE.
- Mr. Redacted should have been transferred to a CCA CSR to ensure his questions regarding MCE charges were being accurately addressed. (*i.e. Redacted was advised more than once MCE was his gas provider.)

Redacted

Belvedere

(Calls 34 through 35)

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
34	12/14/2011	8:56am	4:50	2025C1	Redacted	Sacramento

Observation:

Redacted calls to obtain her account and meter number in order to sign into her PG&E online account. In addition, Redacted questions whether we have received her last payment of \$175. CSR Redacted accurately provides Redacted her account information and confirms the payment is posted. Redacted mentions to Redacted MCE charges of \$39.07 have been billed after the \$175 payment posted. Redacted states she is not subscribing to MCE and has previously called them to opt out. Redacted asks for MCE's phone number and is transferred to a CCA CSR to obtain the number.

Conclusion:

- Redacted did not place blame for the delayed billing with PG&E or MCE.
- Redacted accurately handled the transaction.

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
35	12/14/2011	9:02am	10:51	2264C3	Redacted	Fresno

Observation:

Redacted advises CCA CSR Redacted she is receiving charges for MCE ; however, she opted out the year prior. Redacted is provided her service ID's, MCE's phone number, and advised of her return options. When asked, Redacted provides Redacted a price comparison for her November bill. At the conclusion of the call, Redacted is transferred to CSOL for help with her online account. Redacted mentions she notices she is still enrolled with MCE when she receives a separate November bill from them. Redacted replies the separate bill is due to a system error but does not say whether it is PG&E's or MCE's error. Blame is not placed on either party.

Conclusion:

- Redacted accurately handled the transaction.

Redacted

Tiburon

Call #	Date	Time	Duration	Agent ID	Agent Name	Contact Center
36	12/17/2011	9:16am	8:37	2445C1	Redacted	Sacramento

Observation:

Redacted calls to question why he's received a "supplemental" bill from MCE. CSR Redacted advises Redacted the bill is for MCE charges from 10/20-11/19. Redacted states he has not elected to go with MCE and feels they automatically enrolled him without permission. Redacted advises Redacted he wants to come back to PG&E and questions what the process is. Redacted provides Redacted MCE's phone number and advises him they need to be contacted.

Conclusion:

- As per gen ref, please transfer MCE inquiries to a CCA trained CSR. This action ensures customer questions regarding MCE are accurately answered.

