

Last Updated: 1/4/12 12:56

- High** Critical to complete prior to May 2012
- Med** Important to complete prior to May 2012
- Low** Important to complete as resources are available

#	Item Type	Item Description	Pri.	Date Created	Days Since Creation Date*	Status (If closed indicate completion date)
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1 (2)	Oper.	Noble does not have the ability to cancel charges prior to a bill going out to the customer.	High	05/1/2010	613	In discussion
2 (3)	Tariff	MEA should be able to submit invoices for customers that switch acct #s (due to rate schedule change, etc) but remain active customers (not final) - per Rule 17.	High	05/1/2010	613	01/4/2012

3 (4)	Tariff	If an account cannot be billed within 3 months for a reason that is due to PG&E, and PG&E cannot apply the MCE charges, Rule 17 will not allow PG&E to bill the customer.	High	11/15/2011	50	In discussion
4 (6)	Tariff	Rule 23 modifications.	High	02/1/2011	337	In discussion
5 (7)	Oper.	PG&E will occasionally send "unbillable" off cycle reads that do not correspond to scenarios that require off cycle reads (i.e. Meter exchanges, Move in, and Move out). These should be eliminated.	High	05/1/2010	613	

6 (8)	Oper.	0 kWh reads for 0 days typically received at account start. This should not occur.	High	05/1/2010	613	Long term system fix in progress.
7 (9)	Oper.	The PG&E Snapshot Report and the 814 accept transaction do not contain the applicable base rate for NEMS accounts, number of medical allocations, CARE, FERA, etc.	High	03/8/2010	667	In discussion
8 (11)	Cust. Ser.	Calls to set-up new service are resulting in customers opting out after the call.	High	10/15/2011	81	
9 (15)	Oper.	CIA application for CCA customers needs further information regarding testing.	High	06/29/2011	189	

10 (16)	PG&E needs to provide third party bill viewing mechanism for MCE	High	12/1/2010	399	
11 (17)	Customer phone numbers need to be provided to MCE	High	09/11/2011	115	

12 (18)		New move-in notifications are not provided to MEA in a timely manner. It results in incorrect data being submitted to CAISO. MEA cannot process opt out requests for these customers until we get the information from PG&E. MEA also cannot send the terms and conditions/opt out notice.	High	07/11/2011	177	Sebastien is sending manual spreadsheet of pending issues.
13 (19)		Late usage data submitted resulting in inaccurate CAISO data	High	02/1/2011	337	
14 (20)	Oper.	Final MCE charges should be included on Final PG&E Bills - per Rule 23, P. 1. c. (3) (b)	Med.	05/1/2010	613	In discussion
15 (24)	Oper.	PG&E will occasionally send an 814 drop file and then an 814 enrollment for the same account when an account changes to a NEMs rate. PG&E's handling of this scenario is not consistent. This results in have the same account in MEA's system twice because one gets stopped and one gets created.	Med.	05/1/2010	613	

16 (25)	Oper.	PG&E frequently sends usage for the same time period and amount of reads we have previously received.	Med.	05/1/2010	613	
17 (26)	Oper.	PG&E does not identify customers that are on a payment arrangement.	Med.	05/1/2010	613	
18 (27)	Oper.	Landlord Accounts	High	40299	613	

19 (28)	Cust. Ser.	NEMS credits applied to PG&E charges, resulting in a charge to customers that want to be paid out for annual true-up.	High	05/1/2010	613	
20 (29)	Cust. Ser.	The factors displayed on PG&E's T&D charges are confusing.	High	05/1/2010	613	
21 (30)	Cust. Ser.	PCIA Adjustment credit - added to MCE customer's invoices in Jan 2012.	High	05/1/2010	613	

22	Oper.	824 billing rejections due to file size being too large.	High	10/24/2011	72	
23 (32)	Cust. Ser.	PG&E needs to provide mailing addresses for all customers, specifically new move-in customers. Currently Sebastien sends a pending SA report and that includes mailing addresses but the SA report is not comprehensive because it does not match all of the new enrollments that we are receiving through our system.	High	10/1/2011	95	
24 (34)	Oper.	PG&E is sending actual cogen qualifiers on accounts that they previously did not.	Med.	40852	60	

25	Oper.	MCE charges should be included on PG&E invoice with the same date range - per Rule 23, P. 1. c. (3) (b)	Med.	40856	56	Closed
26	Tariff	60 Day Opt Out Window - TBCC rate should not apply until full 60 days have been offered to customer	Med.	11/10/2011	55	Closed
27	Oper.	In the 867 file (Ref 12), the SA IDs are listed as the DA XREF (Ref 12) instead of listing the SA IDs where they are expected in section 5B of the EDI file.	Med.	05/1/2010	613	Closed
28	Oper.	Data requested on how Annual Electric True-up will be applied under CIA implementation.	High	10/13/2011	83	
29	Oper.	CIA application to NEMS customers hasn't been described or tested	High	06/29/2011	189	
30	Oper.	CIA application to CARE customers has not been described or tested	High	06/29/2011	189	
31	Oper.	Eliminate PG&E initiated Retroactive Opt Outs (Examples: SA 6178066564) and PG&E requests for Retroactive Opt Outs (Thomas King)	High	06/2/2010	581	Closed

* Over 60 days - highlighted in Yellow

Over 90 days - highlighted in Orange

Over 120 days - highlighted in Red

Over 365 days - highlighted in Purple

Assigned	Additional Details	Next Steps	Additional Notes

<p>{Redacted}</p>	<p>PG&E does not allow 810s to be canceled without including a Segment ID. The issue is that Segment IDs are only sent once PG&E has billed the 810. Since MCE inception, Noble has sent 2697 cancellations. Extrapolating that out to full volume, that will likely be over 1000 accounts that are typically waiting for a bill segment ID so we can cancel them, and over 25,000 810 cancellations sent per year.</p>	<p>12/5/11 - Per PG&E An SR has been submitted for this issue (SR# 37708). Once the project has been scoped out and there is a timeframe and cost-estimate associated with the fix, PG&E will meet with upper management to determine if funding is available. Once an SR is submitted it will take approximately two weeks before we can get a cost estimate, and estimated time of completion. PG&E will provide you with updates as they occur.</p> <p>12/6/11 - Per Mtg with PG&E there is 1 option they are considering to have a manual work around to allow Noble to cancel and resubmit charges through a manual process.</p>	
<p>{Redacted}</p>	<p>PG&E says that it is not their responsibility to determine whether or not Rule 17 applies. Randy says that Rule 23 will not allow PG&E to apply the charges.</p>	<p>3 customers not being billed because of Rule 17.</p>	<p></p>

<p>{Redacted}</p>	<p>Carlos suggests that PG&E should make CCA whole for the charges even if Rule 17 applies to PG&E.</p>	<p>PG&E will follow up on this issue this week for more information.</p>	<p>All parties have conflicting positions about whether the customer should have to pay the charges after 3 months or if PG&E should have to cover the charges that are owed to MEA.</p>
<p>{Redacted}</p>	<p>MEA is awaiting response from PG&E regarding most recent additions.</p>	<p>Sebastien will follow up with Randy and respond on Monday 11/21. The modifications need to be submitted to the CPUC.</p>	<p>PG&E provided comments on 11/29/11.</p>
<p>{Redacted}</p>	<p>This is a PG&E system issue and there is not currently a method to prevent this from happening. This issue is related to issue 2.</p>		

{Redacted}	PG&E is looking into a manual cancelation to prevent these reads from being delivered to Noble.	Per PG&E 12/5/11 An SR has been submitted for this issue. The test dates for this issue is scheduled for December 2 - December 24 with an expected install date of January 2012 if there are no defects. If there are defects, the install date of January can be pushed back. I will provide you with updates as they occur.	
{Redacted}	PG&E has communicated this is part of the Enhanced CCASR project. PG&E now has the ability to share this customer information with MCE.	Bill to follow up on Tuesday, 11/22	
{Redacted}	PG&E will investigate these types of issues but needs more information in order to listen to recorded calls. PG&E will verify that the CCA calls are routed to the PG&E CCA CSR teams	Sebastien will follow up on Monday 11/21. Noble will provide Sebastien with call details from these types of customers immediately in the future.	Noble will continue investigate.
PG&E: Randy MEA: Dawn Weisz	MEA would like to know how it will affect customers on a bill pay arrangement.		

<p>{Redacted}</p>	<p>PG&E is exploring an option to provide third party billing through Pay Channel and thinks it will be ready sometime within the first half of 2012. PG&E CSRs can see PDF version of customer bill if customer has an online account. If the customer does not have the online account the CSR can view all of the account info. CPUC has wondered if MCE can have the same access as a PG&E CSR. PG&E thinks that is unlikely because there are very specific permission settings. Resolution 4420 requires that PG&E shares this information and that the rule is effective immediately. Carlos requested that PG&E provide CPUC a date when the information will be shared.</p>	<p>PG&E will circle back with legal and regulatory team to determine when they need to share the information according to Resolution 4420.</p>	
<p>{Redacted}</p>	<p>This information can be provided on the enhanced CCASR. In the short term this can be included in the billing snapshot report. This is included in Resolution E-4420.</p>	<p>Per Bill: project has been approved, but awaiting funding.</p>	

<p>PG&E: Will not identify who is working on this.</p>	<p>PG&E is determining what possibilities there are to enhance the current CCASR. PG&E recognizes the importance of having something like this in place. Language has been included in Rule 23 to improve the timeline for notification. PG&E is currently sending a weekly pending SA report so that MEA can send notices and respond to customer calls. If a customer would like to opt out PG&E will process it manually at MEA's request.</p>	<p>Sebastien meeting with his liaison week of 11/14/11 to discuss this issue and is hoping to have an update.</p>	
<p>Dawn Weisz Sam Schmidt</p>			
<p>PG&E Billing NES Billing</p>	<p>NEMS group is complying. Previously, Leslie identified these items and manually triggered an off-cycle invoice for final MCE charges. MCE's goal is for final MCE charges to be included on final PG&E bills per Rule 23. Noble requests an off-cycle bill be sent to customers with MCE charges if the bill does not go out and PG&E agrees. Both parties agree that sending one bill with all bills is preferable.</p>	<p>NES sent report to PG&E on 11/29, awaiting PG&E manager approval to work the report. Per PG&E 12/5/11 An SR will be submitted for this issue tomorrow, Tuesday, December 6. Tanesha will provide you with updates as they occur.</p>	
<p>NES EDI</p>	<p>The same process should be applied for all accounts when they switch to NEMs.</p>	<p>PG&E indicated this is a training issue during account set-up.</p>	

NES Usage Management & Billing	Noble manually cancels them and doesn't reply to them. PG&E suspects that it's due to manual work arounds.	NES sent samples to PG&E. Awaiting response.	
{Redacted}	This information can be provided on the enhanced CCASR. In the short term this could be included in the billing snapshot report. This is included in Resolution E-4420.	PG&E needs to provide this information in future snapshot reports.	
{Redacted}	Sam said that SB790 dictates that any customer who opts out and moves from one premise to another, the opt out moves with them and they will not be re-enrolled. No process for landlord account opt-outs - at this time when a tenant moves out and new account (new SA) is created under property management/landlord the account is re-enrolled in MCE and must opt-out again.		

	Open	Sebastien Billing	Bill presentation makes it appear that NEMS credits offset the PG&E T&D and gas billing - this often results in the customer seeing a larger than expected charge at yearly true-up. PG&E has no update and needs to accelerate the issue but it would require an algorithm change to the bill.
	Open	PG&E Billing	E-1 customer bill presentation has the PCIA/CRS rates but not the T&D rates listed - this causes customer confusion.
	In the past it's been a lump sum.	PG&E Billing	

	<p>File sent on 11/21. PG&E communicated to Noble that it was rejected on 11/28 (due to holiday). 2500 customers were not billed for November charges because of this.</p>	<p>PG&E estimates that max file size is 2 MB.</p>	
	<p>Open</p>		
		<p>PG&E: Rajesh Barbara</p>	

<p>PG&E: Tanesha Monica Barbara</p> <p>NES Billing:</p>	<p>A small group of accounts consistently send MCE charges out one month behind because the bill window is met by last month's charges. PG&E has identified reason that this problem is occurring and is implementing manual work around (submitting mid-cycle bill) to prevent the problem.</p>	<p>PG&E will issue a mid-cycle bill if it is included on the 810 unbilled report. Noble will monitor this to ensure that it's happening. No automated method fix available.</p>	
<p>NES Billing</p>	<p>Customers should have a full 60 days to opt out prior to being put on TBCC - Per email discussion with Sebastian on 11/10 - both MCE and PG&E are in agreement that the CCASR create date should be used as the window close date for the TBCC return. Language has been proposed in Rule 23 to change definition of 60 days to help solve this problem so that it does not say '60 days or two billing cycles'.</p>	<p>This is reflected in Rule 23 edits.</p>	
<p>NES EDI</p>	<p>Issue solved.</p>		
<p>PG&E: Randy MEA: Dawn Weisz</p>			
<p>PG&E: Randy MEA: Dawn Weisz</p>	<p>CIA application will not change PG&E NEM credits to customers. Customers will still have a minimum \$4.50 monthly charge.</p>		
<p>PG&E: Randy MEA: Dawn Weisz</p>	<p>PG&E CARE rate will show up on the non-generation side of the bill.</p>		
<p>{Redacted}</p>	<p>Both parties agree on this item - per Oct discussions. MCE would like to clarify regarding what expectations should be communicated to angry customers.</p>		<p>Funds should be returned on the next "White Bill".</p>

Interim Solution, Proposed Completion Date (Y or N for PG&E Agreement)	Long Term Solution, Proposed Completion Date (Y or N for PG&E Agreement)	12/17 Mtg Notes	PG&E's Assessment
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<p>12/5 PG&E will provide options for possible solutions and a rough timeline.</p> <p>12/6 Noble will provide examples of current accounts to PG&E as well as a link to the Utility Implementation Guide.</p> <p>12/16 PG&E will respond with a timeline and a confirmation that they have all of the data they need to find a long-term solution</p>		<p>Suzanne, Sam, Lynn, Sebastien to create guidelines for manual cancellation process by December 31 for short-term.</p>	<p>Based on 12/6 meeting the conceptual approach per SR 37708 was not amenable to MCE and PG&E, as it would extend the bill cycle. Other options to explore include:1) Create a more flexible manual cancellation process, 2) explore front-end actions to mitigate the need to cancel charges, and 3) rescope SR 37708.</p> <p>It was unclear to PG&E if the sample transactions submitted by Sam Schmidt of Noble on 12/6/2011 @ 4:19 included data elements for this issue.</p>
<p>PG&E to follow up 12/16 about whether or not to provide a credit to MEA.</p>		<p>Noble - one of the customers is owed a credit and believes that according to Rule 17.1 MEA should be able to invoice the customer. Sebastien will follow up by 12/22. Per 1/4/12 PG&E agreed to credit the charges.</p>	<p>Based on review of the three SAs in question, PG&E is not inclined to honor a credit based on the specific circumstances (Please see inserted comments for this cell)</p>

	<p>PG&E will determine if they are willing to make MEA whole for these unbilled charges. PG&E and MEA will need to agree specific rules identifying who is at fault for unbilled charges. This could be reflected in Rule 23.</p> <p>12/5 MEA edits to Rule 17 & 23 to PG&E</p> <p>12/12 PG&E response to MEA edits</p>	<p>PG&E could not agree with a list of reasons that bills do not go out due to the fault of PG&E.</p>	<p>Edits proposed by MCE for Rule 17.1 and Rule 23 on this issue are not amenable to PG&E as proposed.</p>
N/A	<p>12/5 MEA will respond with modifications.</p> <p>12/12 PG&E will respond with comments</p>	<p>MEA to provide response on Monday 12/19. To run by Mike Campbell</p>	<p>PG&E provided further edits to Rule 23 on 12/13/2011.</p>
<p>Potential manual work around is to label it as unbillable.</p> <p>12/12 PG&E follow up</p>	<p>Modify the system.</p>		<p>It was unclear to PG&E if the sample transactions submitted by Sam Schmidt of Noble on 12/6/2011 @ 4:19 included data elements for this issue.</p>

Develop a manual work around.	Modify the system. 12/16 PG&E to respond on progress.		Current Service Request (38142) is expected to correct this problem.
Include the information on the Snapshot Report which will require funding.	Develop enhanced CCASR.	Early 2012 snapshot update. Approximately 200 discrepancies for CARE.	PG&E management has committed to Enhancing the SnapShot Report and to develop the enhanced CCASR.
		Noble will continue to forward issues along to PG&E. 3 examples relate to CRS, encouragement to opt out, misinformation about billing errors.	PG&E will investigate and take appropriate action on a case-by-case basis as identified by MCE.
	Randy to respond in writing by 12/16	PG&E will not update the test schedule.	No impact for BPP customers. Current BPP process with MCE is ONLY for PG&E charges not broken down by rate component.

N/A		PG&E to follow up with more specific timing (broad timeline is within first half of 2012).	PG&E has been sharing additional information per E-4420 on a work-around basis (i.e. ad-hoc reports). PG&E is in the process of updating its electronic bill viewing feature in 2012. As part of that update, the CCA team asked the team that is project managing to scope out this functionality. Awaiting scoping results.
Include phone numbers in the Snapshot Report.	Develop enhanced CCASR	Info will be included in monthly snapshot report in early 2012 - no specific timeline provided.	PG&E as of October 10th has been providing phone numbers as part of the weekly pending SA report. In addition, PG&E provided an extract of phone numbers for current customers on 12/6/2011. Furthermore, we are planning to include this information in the monthly snapshot report once the enhancement is implemented. Finally, this data element is expected to be scoped into the enhanced CCASR project.

Send weekly pending SA report.	Develop enhanced CCASR to include this information. PG&E needs to determine project scope for implementing this.	Short-term solution in place and long term solution pending.	PG&E has been providing a weekly pending SA start report as of 10/10/11. PG&E is supportive of the CCASR enhancement project.
		Data quality issues and enhanced CCASR will help this. We need a timeline for the CCASR enhancement.	This is an issue that exists for all schedulers.
Develop manual work around.	Modify the system.		PG&E is working on a Service Request (SR)
Develop manual work around.	Modify the system.	Noble will look to see if this is still an issue. Lynn to follow up with Monica.	The NEM set up is a manual process as these accounts are billed in a different system.

		Lynn to follow up with Rajesh	It was unclear to PG&E if the sample transactions submitted by Sam Schmidt of Noble on 12/6/2011 @ 4:19 included data elements for this issue.
Provide information on snap shot report.	Develop enhanced CCASR.	Needs to be in snapshot and CCASR report.	Extract submitted on 12/6/2011 identified existing customers on payment arrangement; Planning to add new data field to MEA's Mthly Snapshot Report. Pending implementation of Enhanced CCASR.
	PG&E followed up with DAAZU. There is currently no way for the landlord not to be automatically re-enrolled with MCE. It will have to be a manual intervention. Could put the landlord at the sub-SA level so that they will not have to opt out every time they restart the account.	PG&E to explore solutions. Sebastien will provide more clarity mid-next week.	After further review, this issue can be addressed by either: 1) By manually placing a characteristic on the account (instead of the SA), or 2) having the landlord establish an Interim Service Agreement (ISA).

			<p>PG&E initially scoped this project for implementation in Q4 2011. However, testing results indicated that the key functionalities shared by bundled customers would need to be redesigned/replaced to accommodate the necessary changes. Consequently, PG&E needs to make additional changes to this project.</p>
			<p>PG&E had previously removed bundled rates from all MEA bills and added T&D rates for E-1 customers. In addition, all T&D rates are posted on PG&E's CCA webpage. PG&E will address long-term structural changes in its bill redesign effort. A settlement funding that redesign work has been filed with the CPUC and is waiting approval, in Phase 3 of PG&E's 2011 GRC. The company has been working with MCE and other stakeholders to obtain input as part of the redesign effort.</p>
	12/16 PG&E to follow up	The credit will not show up in January.	<p>PG&E intends to refund the PCIA adjustment credit promptly as directed by the CPUC once the new PCIA benchmark has been approved by the Commission.</p>

<p>Noble requests that PG&E provide mid-cycle bills for these 2500 customers.</p>	<p>12/ 9 PG&E will respond about mid-cycle bill to these 2500 customers</p>	<p>Noble needs to submit files with only one serial. Sam and Lynn will work with PG&E to see how multiple serials were included. Noble will determine if they can send a file with only one serial and with a 1.5 MB size limit.</p>	<p>PG&E issued mid-cycle bills for the ~2,500 SAs that missed the bill window. These mid-cycle bills began to be issued on 12/9/2011.</p> <p>PG&E asked MEA to break up files into smaller sizes (1.5MB); Maintaining this size limit is imperative. In addition, submitting several reads per file even if properly processed could jeopardize MCE's ability to make the "bill window."</p>
	<p>Noble to send examples to PG&E for new enrollments not included in pending SA provided by PG&E</p> <p>12/16 PG&E to provide update</p>	<p>PG&E to ensure that the SA Report is fully comprehensive</p>	<p>PG&E has always been providing mailing addresses as part of the monthly Snap Shot Report. As of October 10, 2011, a weekly pending SA report also provides data for new customers. The CCASR enhancement would ultimately be another venue for the conveyance of this information.</p>
	<p>12/12 PG&E to follow up</p>		<p>PG&E is in the process of assessing this relatively new issue.</p>

Randy provided information to MEA on 12/6	Randy to respond in writing by 12/12
Randy provided information to MEA on 12/6	Randy to respond in writing by 12/12
PG&E provided update on 12/6	Randy to respond in writing by 12/12
N/A	PG&E not to Retro-actively Opt Out customers. Return Funds to MCE for prior Retro-active Opt Outs.

PG&E's Conclusion / Recommendation	Status per PG&E R = Resolved; P = Pending; U=unresolved	Status Per MCE R = Resolved; P = Pending; U=unresolved

Short-term Solution: PG&E in consultation with Noble to create a flexible manual cancellation process by 1/31/2012.	U	U
PG&E cannot honor a credit request for these three SAs.	R	R

<p>PG&E will consider requests to make MCE whole for specific claimed PG&E failures. This issue is better addressed in the broader service agreement/code of conduct issue.</p>	<p>U</p>	<p>U</p>
<p>Awaiting feedback from MCE.</p>	<p>P</p>	<p>P</p>
<p>PG&E would like to assess sample transactions in order to determine possible solutions.</p>	<p>U</p>	<p>U</p>

The SR is scheduled to go into effect by year end 2011.	P	P
Short-term solution is updating the SnapShot Report; Longer-term solution is the Enhanced CCASR.	P	P
See PG&E Assessment	R	U
See PG&E Assessment. Also, John Warnock to provide testing update in January.	R	U

While scoping results are being determined, identify funding mechanism for enabling this functionality.	U	U
	R	P

	R	P
PG&E will continue to improve the data quality and support MEA to work out process with its scheduling coordinator.	R	U
Report back to Noble once there is more information.	U	U
PG&E will continue to work to ensure accurate account set up.	R	R

PG&E would like to assess sample transactions in order to determine possible solutions.	U	U
	R	R (short-term) P (long-term)
Present to MCE.	P	U

The company recognizes the importance of correcting the bills and is fully committed to implementating changes.	U	U
	R	R
	R	P

<p>PG&E is undertaking an assessment of its IT infrastructure to determine its ability to handle additional capacity under CCA expansion. If the results indicate that the current system is inadequate then it will ensure that appropriate upgrades are made.</p>	<p>R</p>	<p>P</p>
	<p>R</p>	<p>P</p>
	<p>U</p>	<p>0</p>

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N. 1. b. (3) PG&E shall provide the CCA's (or their designated agents) reasonable and timely access to meter data as required to allow the proper performance of billing, settlement, scheduling, forecasting and other functions.

P. BILLING SERVICE OBLIGATIONS (Cont'd.)

1. Introduction (Cont'd.)

c. Bill Ready PG&E Consolidated Billing (Cont'd.)

(3) Timing Requirements (Cont'd.)

(b) Except as provided in Paragraph 3.a above, PG&E shall require that CCA and PG&E charges be based on the same billing period data to avoid any confusion concerning these charges.