

Date: September 17, 2012

From: Gabe Petlin, CPUC Energy Division

To: Sidney Dietz, PG&E  
Redacted, PG&E

Energy Division Requested Changes to PG&E Revised Customer Energy Statements (RCES, Advice Letter 3304-G / 4052-E).

**All Residential Statements – These apply universally to residential statements**

- Page 1
  - Monthly Billing History - The graph on Billing History is too small to be read, particularly the Average Daily Energy Comparison. Increase size for readability.
  - Special Account Information – All statements should state the program or rate of the customer here such as TOU, SmartRate etc. Could be more user-friendly like: “You are enrolled in TOU etc.” Drop “special” from “Account Information” and move this section up to below the address section.
  - Savings Alert – All statements should have a savings alert message. This can rotate from different programs and rates each month.
  - Important Messages - Include notices about other rates and programs that can save the customer money. Add a savings teaser either in Savings Alert or here: Use AMI capabilities (after ~9 months of AMI data to proactively inform customers who would be savers on alternative programs like TOU/SmartRate.
  - Important messages – Does the CARE message need to be in Spanish for everyone? If not then this could free up space to increase the graph size or include other messages.
  - We cannot determine where it is indicated what climate zone a customer is in. This information should be readily apparent somewhere on the bill.
  - The subject of each page of the statement should stand out more:
    - Pg1 – “Your Account Summary”
    - Pg2 – new title: “Explanation of Bill and Important Phone Numbers”
    - Pg3 – “Details of Electric Charges”
    - Pg4 – “Details of Gas Charges”
- Page 2
  - Instead of a table with % of baseline, consider a more user-friendly graphic like a funnel shaped bucket with lines across the bucket representing each tier.
  - Simplify language and increase text font.
  - Electric charges breakdown should be made bigger.
- Page 3
  - Make the graph at the bottom bigger so it is more readable.
  - Right Column, in “Additional Messages” section – When a bill includes two calendar periods with different rates this should be explained in simple terms.
  - Additional Messages - Have a fact each month, (or change it every three months) next to the graph to provide context for usage- a typical refrigerator uses x kWh per month. etc. (PG&E has a great section online showing a bunch of household appliances, how

much they use, and how a person can save energy and money- PG&E can get its monthly fact from there.)

### **CARE (Format 2)**

- Page 1
  - Important Messages - For customers already enrolled in CARE the Important Messages section should be used to encourage them to join other programs that can help them save money. It is confusing to use this section to encourage them to join a program they are already in. It also should periodically include information on how to remain in CARE and learn about CARE.
  - Account Information – Instead of “CARE Discount” make this more user-friendly: “You are enrolled in the CARE Discount.” Or “You receive the CARE Discount.”
- Page 3 & 4
  - Additional Messages Section (on right):
    - Show the different rate for each Tier on a separate line, to improve readability.
    - Show the CARE rates for both billing time periods if applicable. In the Gas CARE bill Additional Messages section you show the CARE rates for two billing time periods. The same should be done for the electric bill.
    - Ensure that the CARE Rates message is always the 1<sup>st</sup> message displayed if there are more than one messages in the Additional Messages section.
  - CARE discount line item should be more prominent.

### **Time of Use Residential (Format 5) – Also applicable to residential SmartRate**

- Page 1
  - Need to indicate in “Special Account Information” that rate is Time of Use (or SmartRate) as you have on other statements.
  - Add a Savings Alert as you have for CARE. The message should say: “You saved \$X.XX this month by participating in NAME OF PROGRAM.” Rotate this savings message with other messages such as “By reducing your electricity use during peak hours (2pm-6pm) you can save money on your bill.”
  - Important Information – For SmartRate customers include event notification options.
- Page 3
  - Increase the size of the graph for improved readability.
  - Upper left (below “Rate Schedule”) include: “Enrolled Programs: Time of Use” or the appropriate enrolled program. You do this for the commercial PDP statement.
  - Right Column – provide simple clear explanation of time variant rates. Alternatively place this text near the TOU graphs.

### **ALL Commercial Formats**

- Page 1
  - Important Information - Provide a bill comparison teaser: “If you were enrolled in NAME OF PROGRAM you would have saved \$x last month.” Or structure the message for the appropriate metric or time period. Include more information on TOU/PDP for customers not already enrolled in those programs.
  - Make graph bigger.

- Page 2
  - Why are you using so much space to explain tiers and baselines to non-residential customers when they don't have tiers and baselines? This space could be better used to explain energy charges, demand charges, customer charges, and TOU/PDP, which are more relevant to non-residential customers.
- Page 3-4
  - Make graphs bigger.

**Commercial TOU and PDP (Format 13, 14)**

- Page 1
  - Savings Alert – Include savings alerts based on successful reduction of peak usage during peak pricing events.
  - Make graph bigger
  - List options for notification prior to peak pricing event days under important messages.
  - Include a reminder about saving money by reducing peak usage.
- Page 3
  - Explain demand charge, energy charge, PDP event hours/notification/charges on right side or somewhere on the bill.

**48 Hour Notice Format A (Tab 19)**

- Put text of letter above “ways to pay” section.
- 48 Hour Notice envelopes should be different than for 7 day, somehow reflecting urgency and importance of opening it.

**7 Day Notice Format B (Tab 20)**

- Include same language as in format A regarding eligibility for financial assistance.

**Low Vision (Format 9)**

- Did this bill get tested with customers who need a large print bill? We want to confirm that it is big enough.