Date: **October 4, 2012**

From: **Shari Rifas, PG&E**

To: **Gabe Petlin, CPUC Energy Division**
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Energy Division Requested Changes to PG&E Revised Customer Energy Statements (RCES, Advice Letter 3304-G / 4052-E).

<u>All Residential Statements – These apply universally to residential statements</u>

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.	○ PG&E will enlarge to the extent possible within the same footprint. Note that the actual Energy Statement will be at a higher resolution than the samples.
○ 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.	○ Programs (PTR, PDP, SmartRate) will be stated, Rate Schedules will not. The heading will be revised to show "Your Enrolled Programs" or similar wording. Order of sections will not change.
○ Savings Alert – All statements should have a savings alert message. This can rotate from different programs and rates each month.	○ The Savings Alert will remain for actual CARE/FERA and other program savings in the current bill.
○ 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.	○ PG&E will provide ED with a list of messages which appear on page 1. Messages which require shadow billing are not part of RCES. Note that the primary purpose of the Energy Statement is to communicate billing information: what do you owe, when, why, and how to pay.
○ 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.	○ PUCode §739.4(b) requires multi-lingual CARE message on bills
○ We cannot determine where it is indicated what climate zone a customer is in. This information	○ Climate Zone is on detail pages as is the daily baseline quantity

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should be readily apparent somewhere on the bill.	for that zone with the calculation showing how to reach the total Tier 1 allowance.
○ 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"	○ Retain customer tested design.
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.	○ PG&E will provide a revised BackofBill, possibly without the chart.
○ Simplify language and increase text font.	○ PG&E is open to suggestions.
○ Electric charges breakdown should be made bigger.	○ PG&E is open to increasing the size if other text can be reduced or eliminated
Page 3	
○ Make the graph at the bottom bigger so it is more readable.	○ PG&E will enlarge to the extent possible within the same footprint. Note that the actual Energy Statement will be at a higher resolution than the samples.
○ Right Column, in "Additional Messages" section – When a bill includes two calendar periods with different rates this should be explained in simple terms.	○ PG&E will provide ED with a list of messages which appear on pages 3 & 4, including the electric seasonal crossover message.
○ 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	○ PG&E will provide ED with a list of messages which appear on pages 3 & 4. Note that the primary purpose of the Energy Statement is to communicate billing information: what do you owe, when, why, and how to

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.	○ CARE message shown quarterly is legislative requirement. Billing system constraints make it difficult to present messages by rate schedule. Other changes to the Energy Statement make clearer to customers on page 1 that they are on the CARE program and receiving CARE discounts. In addition, the detail charges section tells customers by when they need to renew their CARE enrollment.
○ Account Information – Instead of "CARE Discount" make this more user-friendly: "You are enrolled in the CARE Discount." Or "You receive the CARE Discount."	○ The heading will be revised to show "Your Enrolled Programs" or similar wording.
Page 3 & 4	
○ Additional Messages Section (on right):	
▪ Show the different rate for each Tier on a separate line, to improve readability.	▪ Agreed
▪ 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.	▪ Agreed
▪ Ensure that the CARE Rates message is always the 1st message displayed if there are more than one messages in the Additional Messages section.	▪ Agreed
○ CARE discount line item should be more prominent.	○ Retain customer tested design.

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.	○ Section will be used for programs including SmartRate, PDP, PTR if approved, On Bill Financing, etc. Rates (e.g. TOU) will be shown on pages 3 & 4.

○ 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."	○ The Savings Alert will appear for actual CARE/FERA and other program savings in the current bill and only actual savings in the current bill.
○ Important Information – For SmartRate customers include event notification options.	○ SmartRate customers enroll or affirmatively decline notification as part of program enrollment.
Page 3	
○ Increase the size of the graph for improved readability.	○ PG&E will enlarge to the extent possible within the same footprint. Note that the actual ES will be at a higher resolution than the samples.
○ Upper left (below "Rate Schedule") include: "Enrolled Programs: Time of Use" or the appropriate enrolled program. You do this for the commercial PDP statement.	○ The "Rate Schedule" line already identifies TOU for customers so adding it to enrolled programs would be duplicative.
○ Right Column – provide simple clear explanation of time variant rates. Alternatively place this text near the TOU graphs.	○ There is no simple, clear, brief explanation of tiered TOU rates. Customers on TOU have a very high awareness of the characteristics of TOU. Note that the graphic includes the TOU hours specific to the customer's rate schedule. PG&E uses other channels to educate customers on TOU.

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.	○ PG&E will provide ED with a list of messages which appear on page 1. Messages which require shadow billing are not part of RCES.
○ Make graph bigger.	○ PG&E will enlarge to the extent possible within the same footprint. Note that the actual Energy Statement will be at a higher resolution than the samples.

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.	○ PG&E will use a different BackofBill for Residential and Non-Residential customers. Demand Charges will be defined on the Commercial BackofBill. ○ Follow-up: Provide sample non-res BackofBill.
Page 3-4	
○ Make graphs bigger.	○ PG&E will enlarge to the extent possible within the same footprint. Note that the actual Energy Statement will be at a higher resolution than the samples.

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.	○ Messages which require shadow billing are not part of RCES.
○ Make graph bigger	○ PG&E will enlarge to the extent possible within the same footprint. Note that the actual Energy Statement will be at a higher resolution than the samples.
○ List options for notification prior to peak pricing event days under important messages.	○ 86% of PDP customers, excluding billboards, are enrolled in notification.
○ Include a reminder about saving money by reducing peak usage.	○ PG&E will provide ED with a list of messages which appear on page 1. In general, PG&E uses other channels to educate customers on TOU
Page 3	
○ Explain demand charge, energy charge, PDP event hours/notification/charges on right side or somewhere on the bill.	○ PG&E will provide ED with a list of messages which appear on page 3. Demand Charges will be defined on the Commercial BackofBill

48 Hour Notice Format A (Tab 19)

○ Put text of letter above "ways to pay" section.	○ Retain current design.
○ 48 Hour Notice envelopes should be different than for 7 day, somehow reflecting urgency and importance of opening it.	○ PG&E will pilot different envelops and evaluate customer reaction.

7 Day Notice Format B (Tab 20)

○ Include same language as in format A regarding eligibility for financial assistance.	○ Financial Assistance to residential customers is different from that available to non-residential customers receiving the 7 day notice.

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.	○ Yes. The Low Vision statement was tested with vision-impaired customers with help from the organization: Lighthouse for the Blind and Visually Impaired.