

From: Pol Sandro-Yepes  
Sent: 1/16/2014 8:56:28 AM  
To: [Redacted]; Beckie Menten  
(bmenten@marinenergy.com)  
Cc: [Redacted];  
jean.lamming@cpuc.ca.gov (jean.lamming@cpuc.ca.gov); [Redacted]  
[Redacted]; DAWN WEISZ  
(dweisz@marinenergy.com) (dweisz@marinenergy.com); Pitcock, Maril  
(/O=PG&E/OU=Corporate/cn=Recipients/cn=MxWL); Dietz, Sidney  
(/O=PG&E/OU=Corporate/cn=Recipients/cn=SBD4); Gandesbery, Mary (Law)  
(/O=PG&E/OU=Corporate/cn=Recipients/cn=MAGq); [Redacted]  
[Redacted]; ELIZABETH KELLY  
(Ekelly@MarinEnergy.com) (Ekelly@MarinEnergy.com); Greg Morse  
(gmorse@mcecleanenergy.com)

Bcc:

Subject: RE: LIB Functionality for MCE OBR Next Steps

Greeting Beckie,

Thank you for the opportunity to comment. See my comments/questions below

PG&E / Pol to clarify procedures and constraints.

Customer payments will follow the existing payment allocation methodology between MCE CCA charge and PG&E energy charges. PSY – No issue on my end

PG&E customer service representatives will be provided a script (in GenRef) for customers that call to ask about the loan that directs them to MCE. PSY – No issue on my end

No overpayments or prepayments will be allowed through the utility billing system. Any overpayments made on a monthly PG&E bill will be credited against future energy charges. PSY – I would have assumed that if the customer over paid their bill the excess dollars would be allocated based on the payment allocation rules and be applied proportionally to the T&D and OBR charges. Not solely to the future energy charges.

MCE will be responsible to maintain the details of the loan payment, principal, interest, fees, and past due amounts. MCE will be responsible for reconciling this data to the remittance data provided by PG&E. MCE will provide PG&E notice of any billing or payment error with respect to a Loan Charge within 45 days of the remittance to MCE. Any errors discovered by MCE, its Lender or other agent regarding amounts billed by PG&E must be communicated

within this timeframe. PSY – No issue on my end

If the Customer disputes the charges PG&E may remove the loan charge if the dispute is not resolved within 10 calendar days. PSY – I am uncomfortable with this item. I don't think PG&E should get involved with a billing dispute between MCE and its customer. In the DA or CCA arena PG&E simply refers the customer back to the ESP or CCA to handle billing disputes. Putting PG&E in the middle of the dispute when they do not have access to the contracts that may have been executed between the CCA and the customer seems like a burden PG&E would not want to take on. As these are non-disconnectable charges, I would think PG&E would rather defer to the CCA for action.

If the Customer is no longer a MCE CCA customer this sounds counter intuitive, this program is designed for non MCE CCA customers – am I misunderstanding this sentence? or if the PG&E account is stopped, Does this mean that the customer's PG&E Customer account is closed or Service Account or both? I would assume if the customer moves from one Service Address to another Service address in PG&E's territory MCE would still be able to bill the customer and the OBR amount can be moved from 1 SA id to the other. the loan repayments on the bill will be stopped including any past due payments prior to final bill for the account being processed and MCE and its Lender will be solely responsible to collect from the Customer the remaining payments due on the Eligible Loan. I would think we would use the same logic for the CCA return receivables. I think the process is that PG&E will continue to try to collect for 60 days after the final bill has been presented to the customer, then PG&E will send us notification of a return receivable. This does bring up the question of how PG&E will notify MCE of return receivables.

Pol Sandro-Yepes  
Manager - Business Application Systems Support

Noble Americas Energy Solutions  
401 W. A Street, Suite 500  
San Diego, CA 92101  
Wk (619) 684-8168  
Mobile (619) 818-7553  
[PSandro-Yepes@Noblesolutions.com](mailto:PSandro-Yepes@Noblesolutions.com)

**From:** Beckie Menten [mailto:bmenten@marinenergy.com]

**Sent:** Thursday, January 16, 2014 8:26 AM

**To:** [Redacted]

**Cc:** jean.lamming@cpuc.ca.gov; Dawn Weisz (dweisz@marinenergy.com); [Redacted]

[Redacted]; Pitcock, Maril; Elizabeth Kelly (ekelly@marinenergy.com); Gandesbery, Mary (Law); Greg Morse; Dietz, Sidney; [Redacted]; Pol Sandro-Yepes

**Subject:** Re: LIB Functionality for MCE OBR Next Steps

Redacted

Attached is the OBR Agreement between PG&E and MCE with MCE's proposed edits. We have taken a first stab at making the minimal amendments we think are necessary to characterize the non-customer component, however there remains a few procedural points that I think it would be best for Pol and / or PG&E to take a first stab at filling out. These are highlighted in the attached. Please also note that we have changed MEA with MCE throughout and these changes are not tracked.

Would it make sense to schedule a quick check in call for tomorrow to discuss these proposed edits and see if this fulfills the purpose?

Thanks,

-Beckie

On Wed, Jan 15, 2014 at 5:03 PM, Redacted wrote:

All-

Per our meeting last week and next steps below, attached is our DRAFT MOU for implementing the LIB technology for non-MCE customers in MCE service territory. As discussed, the purpose of this document is to clearly define the scope of work included in our effort to enable LIB for MCE.

In addition, Dawn and I spoke on Monday and she proposed making a modification to the existing OBR Billing Agreement (executed October 8) for the same purpose instead of using an MOU. Once we get the MCE proposed language, PG&E can also evaluate this as an option.

In the meantime, we would ask that MCE please provide feedback on the

attached MOU, and hopefully it will meet everyone's expectations so we can move forward.

In addition, please see the updated timeline below:

- January 15<sup>th</sup> – PG&E sends MEA MOU
- January 22<sup>nd</sup> – Execute MOU
- January 31<sup>st</sup> – submit Advice Letter to ED – (coordinate with ED for fast track approval)
- First quarter – MCE added as a vendor
- March 2014- MEA OBR for non-MCE customers goes live

Thanks again for everyone's participation, please let me know if you have any questions.

Redacted

Pacific Gas and Electric Company

Office: Redacted

Cellular

Email:

**From:** Redacted

**Sent:** Friday, January 10, 2014 2:37 PM

**To:** 'jean.lammino@cpuc.ca.gov'; Dawn Weisz (dweisz@marinenergy.com); Redacted

Redacted; Pitcock, Maril; Elizabeth Kelly (ekelly@marinenergy.com);

Beckie Menten; Redacted; Greg Morse; Dietz, Sidney; Redacted

Redacted; Pol Sandro-Yepes

**Subject:** LIB Functionality for MCE OBR Next Steps

All-

Just to confirm next steps we discussed today on the call, please see below and let me know if I missed anything:

-PG&E will send a draft MOU to the group for review by 1/15 or earlier

-In parallel PG&E will start preparation of the Advice Letter for submission after MOU execution

-PG&E will send a high level project timeline to Jean and the group by 1/15 or earlier

Thanks for everyone's participation. We appreciate your help ensuring everyone is on the same page moving forward.

Redacted

Pacific Gas and Electric Company

Office: Redacted

Cellula

Email:

PG&E is committed to protecting our customers' privacy.

To learn more, please visit

<http://www.pge.com/about/company/privacy/customer/>

*MCE is committed to protecting customer privacy. Learn more at: [www.mceCleanEnergy.com/privacy](http://www.mceCleanEnergy.com/privacy)*