

From: Miller, Karen  
Sent: 6/13/2014 3:29:51 PM  
To: Dietz, Sidney (/O=PG&E/OU=Corporate/cn=Recipients/cn=SBD4)  
Cc: DeVine, Kyle (kyle.devine@cpuc.ca.gov); Hill, Juanita (juanita.hill@cpuc.ca.gov);  
Kaur, Ravneet (Ravneet.Kaur@cpuc.ca.gov); Martinez, Alejandra  
(Alejandra.Martinez@cpuc.ca.gov)  
Bcc:  
Subject: CHANGES Resolution CSID - 004 and CHANGES Scope of Work

Hi Sid,

Attached is the CHANGES Scope of Work that is used with all 4 IOUs. Also, below is a link to the Commission Resolution that initiated the CHANGES Pilot Program. CSID - 004 quotes back to the Commission's Limited-English Proficiency (LEP) Decision and explains that CBOs will be used as liaisons and will work with the consumer. We have pulled out the specific text and show it below. You can follow the link to read the full Resolution CSID - 004.

It appears clear to us that the intention is that the CBOs work directly with the consumers and interact on their behalf with the utility representatives. This has not been an issue since the initiation of the first version of the CHANGES pilot program. I do hope that we can work through the "new" interpretation of how to serve the LEP consumers.

Thanks so much for looking into this for us. We appreciate your assistance. Please call me if you have any questions.

Karen  
415-703-2299

Link to CSID-004

[http://docs.cpuc.ca.gov/PublishedDocs/PUBLISHED/FINAL\\_RESOLUTION/127338.htm](http://docs.cpuc.ca.gov/PublishedDocs/PUBLISHED/FINAL_RESOLUTION/127338.htm)

Specific text:

page three -

"LEP consumers benefit from assistance provided by CBOs. The CPI Decision states, 'We believe that we can improve our complaint resolution efforts by working more with CBOs, which possess unique insights into problems faced by specific communities.'" The CPI Decision also states that, "CBOs play an important role in bridging the barriers to effective communications between carriers and LEP consumers. Representatives at the CBOs are from the same cultures they serve, enabling them to possess the insights necessary for such a program and also to provide in-language assistance which is culturally sensitive."

Page four where we discuss the different elements of the program - "2. Dispute and Need Resolution -the CBOs will work directly with the consumers and the IOUs to assist customers with issues such as, bill inquiries, payment arrangements, avoidance of service disconnections, or restoration of service. The current TEAM program provides assistance in 38 languages. Representatives at the CBOs are of the same culture as the consumers they assist and are trusted by them, enabling them to liaison between the utility and the consumer, and to negotiate on the consumer's behalf. The CBO representative will fact find and analyze the consumer's concern to determine if the CBO representative will help the consumer receive a certain need, such as set up payment arrangements, or if the representative will advocate for the consumer to resolve a dispute."

Finally on page 8, ordering paragraph three - "3. CSID, the IOUs, and the contractor shall meet at least once a month to evaluate the program and modify it, if necessary, within the scope of the program outlined in this Resolution."

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From: Miller, Karen  
Sent: Tuesday, June 10, 2014 12:31 PM  
To: DeVine, Kyle; Martinez, Alejandra  
Subject: RE: PG&E CHANGES Designated Phone Line (Follow-up)

Do we have documentation of the "predetermined process?"

-----Original Message-----

From: DeVine, Kyle  
Sent: Tuesday, June 10, 2014 12:19 PM  
To: Martinez, Alejandra  
Cc: Miller, Karen  
Subject: RE: PG&E CHANGES Designated Phone Line (Follow-up)

Hello, here's the CHANGES Scope of Work. I highlighted the section I think is problematic. Alejandra, nice note. If he gives you flack, I'm pretty sure this is more than not complying with the "team's" agreement, but PG&E is not complying with CPUC directives/direction. PS maybe we (you) should also recommend that he bring his supervisor? I leave that up to you two to decide. Can you tell I'm itching to let him have it? But of course in a nice way.

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From: Martinez, Alejandra  
Sent: Tuesday, June 10, 2014 11:03 AM  
To: [Redacted]; DeVine, Kyle  
Cc: [Redacted] Miller, Karen; McMahon, Loreen  
Subject: RE: PG&E CHANGES Designated Phone Line (Follow-up)

Hello [Redac]

The changes you note below should have been discussed with PAO staff and CHANGES contractors . Prior to implementing such drastic changes you must write a letter to the CSID director explaining the proposed changes and reasons for not complying with our previous agreements.

We also need to set up an in person meeting to discuss this issue. Kyle, Karen and I will be in San Francisco next week June 17 and 18th. Please decide which date and time you can make it to or if you have alternate times, you may make suggestions.

Tuesday, June 17 - 9:30am

Tuesday, June 17 - 2:30PM

Wednesday, June 18 - 12:30PM

Wednesday, June 18 - 1:30PM

-----Original Message-----

From: [Redacted]

Sent: Monday, June 09, 2014 3:46 PM

To: [Redacted]; DeVine, Kyle; Martinez, Alejandra

Cc: [Redacted]

Subject: RE: PG&E CHANGES Designated Phone Line (Follow-up)

Hi, Casey and et al,

Updates:

1) Toll Free Line: I'm in the process of getting the CHANGES toll-free line straightened out shortly. Meanwhile, please continue to use the PG&E toll-free line: 800-743-5000.

2) PG&E Customer Service: For the privacy & protection of the customer account, PG&E can no longer release account information to a third party with only verbal consent unless:

- the customer of record can provide written consent to authorize a Third Party on the account
- PG&E can provide information to the customer directly.

While this is a CPUC requirement regarding customer privacy and account protection, it has not necessarily changed the policy we've had in place for CHANGES to support our LEP customers. We ask that the customer remain present with CBO representative while on the call with the PG&E customer service representative (CSR). Our PG&E CSRs can get a PG&E-approved translator and provide information directly to the customer while the CBO representative is present.

Casey/Alejandra,

Can you provide me details (i.e. account number and date of call) around instance(s) a CHANGES CBO was denied conversation with PG&E Customer Service while the client was present? I'd really appreciate the information so I can make sure these efforts are smooth and painless.

Regards,

[Redacted]

Pricing Products

Pacific Gas and Electric Company

Redacted

From: [Redacted]

Sent: Friday, June 06, 2014 2:27 PM

To: Kyle DeVine

Cc: [Redacted]; Martinez, Alejandra; [Redacted]

Subject: Re: PG&E CHANGES Designated Phone Line

I don't think they mean CHANGES policy. It sounds like the CSRs have been told not to speak to anyone but the customer.

On Jun 6, 2014, at 2:03 PM, DeVine, Kyle <kyle.devine@cpuc.ca.gov> wrote:

What policy? The CPUC has made no changes in the CHANGES pilot program. It still exists and my understanding is it will continue to do so until the CPUC determines otherwise. I'm headed out right now for some R and R, but I trust you will handle this Erwin. Thanks. If anything else comes up, please contact Alejandra for assistance!

From: [Redacted]

Sent: Friday, June 06, 2014 1:49 PM

To: [Redacted]

Cc: DeVine, Kyle; [Redacted]; Martinez, Alejandra; [Redacted]

Subject: PG&E CHANGES Designated Phone Line

Erwin,

CHANGES CBOs have informed me that the PG&E CHANGES Designated Phone Line is not working. I called the number and conformed that it is out. When you call, you get recording that says "Sorry the service you are trying to reach is unavailable. We are sorry for this inconvenience. Good bye."

Unfortunately, after getting that message, CBOs are calling the regular PG&E line and Customer Service Reps are refusing to speak with the CBOs. They refuse even when the client is present and n authorization is given. One CBO was told that this is because of a policy change that was instituted a week ago. Can you please look into this? Thanks.

Casey

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

To learn more, please visit <http://www.pge.com/about/company/privacy/customer/>