

From: DeVine, Kyle  
Sent: 7/23/2014 7:42:03 AM  
To: Dietz, Sidney (/O=PG&E/OU=Corporate/cn=Recipients/cn=SBD4); [Redacted]  
[Redacted]  
[Redacted] Martinez,  
Alejandra (Alejandra.Martinez@cpuc.ca.gov)  
Cc: Miller, Karen (karen.miller@cpuc.ca.gov); Hill, Juanita (juanita.hill@cpuc.ca.gov);  
Kaur, Ravneet (Ravneet.Kaur@cpuc.ca.gov); [Redacted]  
[Redacted]  
Bcc:  
Subject: RE: PG&E Cases (escalated request for customer)

Good morning and thank you for getting back to me.

Actually I disagree with you. I don't see PG&E as being responsive to the CPUC order in Resolution CSID – 004, or as being responsive to the CSID-led pilot program (as the CPUC ordered) that was developed and fine-tuned several years ago. I want to remind you that PG&E was involved in those discussions and at that time was an advocate for the program as we originally designed it. Specifically, that the CBO caseworkers would negotiate on behalf of consumers, not merely coach them.

I see this continued back and forth for more than a month now as the CPUC and PG&E going in circles (and dare I say as PG&E misleading CPUC staff?). You initiated these changes prior to discussing them with us and are continuing with them, even after we, CSID, believed they were worked out otherwise. We believe that you do not have the authority to change what has already been established and I am hoping that we can settle this once and for all. If you want we can set up a conference call but frankly I'm reluctant to meet with you if it means that we are just going through more rounds of the same thing.

[Redacted] and everyone, I am really bothered that we are experiencing this situation, especially, when your Vice President of Regulatory Affairs, Brian Cherry, in my opinion, indicated to my Commissioners and my Executive Director a different situation in his June 26 letter to the Service Worker Project for Affordable Utilities (and provided a copy to the CPUC). Specifically Mr. Cherry writes,

“Your letter also states that, ‘as of May 1, 2014, ... [PG&E] has prohibited third parties,

such as Service Worker Project for Affordable Utilities volunteer advocates, from advocating for and assisting low-income customers who face shut-offs or have already had their power shut off, even though the customers are on the telephone and confirm our volunteers' authorization to represent them.' In fact, PG&E's customer service policies allow such third parties, such as Community Based Organizations (CBO) representing low-income customers, to obtain access to customer energy usage and billing information by telephone while the customers are present and confirm the third party's authorization to represent them." Emphasis added via highlight.

Thanks you for reading this note. Again I do look forward to resolving this and us getting back to working together in implementing the pilot as it was originally designed and intended. I look forward to your response.

Kyle DeVine

**From:** [Redacted]  
**Sent:** Tuesday, July 22, 2014 4:55 PM  
**To:** DeVine, Kyle; Martinez, Alejandra; [Redacted] Dietz, Sidney  
**Cc:** Miller, Karen; Kaur, Ravneet; Hill, Juanita; [Redacted]  
**Subject:** RE: PG&E Cases (escalated request for customer)

Hi, Kyle,

We're working to be responsive. The CBOs can advocate by listening in on the call and coaching the customer what statements to make or what questions to ask. This was recently done on a call from Friday, 7/18, for another customer, named [Redacted]. The PG&E Senior Service Representative would ask questions and Nora, from Central California Legal Services, would tell the customer what to ask or how to respond. Nora's advocacy helped [Redacted] her utility concerns with PG&E customer service.

For this particular case ([Redacted]) Nora informed me today that the customer could not be reached because she does not have a phone. [Redacted] also has not responded to Nora's urgent letter correspondence to give her a call. [Redacted] was at risk of being shut off tomorrow due to non-payment. However, given the customer's circumstances, [Redacted] and I requested a 2<sup>nd</sup> extension on this account. Credit-Collections stopped the shut off notice and granted a final extension date of 8/22/14 for the customer to work out a payment arrangement with PG&E. I shared the news with Nora and she appreciated the extension. Nora will travel to the customer's home tomorrow so she can help the customer set up a payment arrangement with PG&E customer service.

Together, we're working on solutions (i.e. modified 79-1095 form, more communications with CSRS, interactions with CBOs, etc) to enhance the way CBOs advocate on behalf of customers while ensuring consumer protection/privacy. Thank you for your support.

Regards,

Redacted

**From:** DeVine, Kyle [mailto:kyle.devine@cpuc.ca.gov]  
**Sent:** Tuesday, July 22, 2014 11:29 AM  
**To:** Redacted Martinez, Alejandra; Redacted Dietz, Sidney  
**Cc:** Miller, Karen; Kaur, Ravneet; Hill, Juanita; Redacted  
**Subject:** RE: PG&E Cases (escalated request for customer)

Then we are back at square one and I thought we had at least worked out that a CBO can advocate on a call when the client is present.

**From:** Redacted  
**Sent:** Tuesday, July 22, 2014 9:53 AM  
**To:** DeVine, Kyle; Martinez, Alejandra; Redacted  
**Cc:** Miller, Karen; Kaur, Ravneet; Hill, Juanita; Redacted  
**Subject:** RE: PG&E Cases (escalated request for customer)

Hi, Kyle,

Norma cannot negotiate a pay plan on a customer's behalf. Even if there is an information release form on file, it currently does not allow the CSRs to negotiate or establish payment arrangements with a third party. Nora can be on the line to hear the questions asked by the CSR and coach the customer what to ask or say back to the CSR however, all questions and agreements made must come from the customer.

We need to have the customer present on the line with PG&E Customer Service to request the

payment arrangement. Can we make this happen today?

Regards,

Regards,

Redacted

**From:** DeVine, Kyle [mailto:kyle.devine@cpuc.ca.gov]  
**Sent:** Monday, July 21, 2014 3:13 PM  
**To:** Redacted; Martinez, Alejandra; Redacted  
**Cc:** Miller, Karen; Kaur, Ravneet; Hill, Juanita  
**Subject:** RE: PG&E Cases (escalated request for customer)

Hi Redacted

I understand that you are trying to reach Nora and the customer to be able to assist the customer. That's great. But I just want to be sure we're on the same page. If Nora is able to get the customer to join the call, will you then permit Nora to proceed with the negotiations or will the CSR insist on talking only to the customer?

Take care,

Kyle

**From:** Redacted  
**Sent:** Monday, July 21, 2014 11:13 AM  
**To:** Martinez, Alejandra  
**Cc:** DeVine, Kyle  
**Subject:** RE: PG&E Cases (escalated request for customer)

Hi, Alejandra,

I'm following up on this case and observed the customer hasn't entered into a payment arrangement yet. The customer's at risk of being shut off if [Redacted] does not contact PG&E Customer Service by tomorrow. Can you please ask Nora, Central CA Legal Services, to have a conference call with the customer present on the phone with PG&E customer service? The present Form 79-1095 on file only allows for information release and does not allow Nora to request payment arrangements on the customer's behalf.

I want to help this customer set up this payment arrangement. I'll work directly with Nora to help facilitate the conversation with PG&E customer service if necessary.

Please give me a call if you have any questions.

Thank you.

[Redacted]

**From:** Martinez, Alejandra [<mailto:Alejandra.Martinez@cpuc.ca.gov>]  
**Sent:** Monday, June 30, 2014 11:23 AM  
**To:** [Redacted]  
**Cc:** DeVine, Kyle  
**Subject:** RE: PG&E Cases

Hello [Redacted]

Casey had notified me that they attempted to fix the problem with [Redacted] account but when they made the

call to PG&E the CSR still refused to speak to the CBO rep and therefore no agreements were made for the customer. Can you please explain this? Have your CSRs been properly notified about the CHANGES program after our discussion last week?

CBO: Central California Legal Services:  
CBO Rep: Nora

Customer Name: [Redacted]

Account # 3836507416.

Thanks

**From:** [Redacted]  
**Sent:** Tuesday, June 24, 2014 1:53 PM  
**To:** Martinez, Alejandra  
**Cc:** DeVine, Kyle  
**Subject:** RE: PG&E Cases

After speaking with customer service, we were able to prevent a disconnection and temporarily remove the account from collections. I'll go over details and customer options with you over the phone.

Regards,

[Redacted]

**From:** Martinez, Alejandra [<mailto:Alejandra.Martinez@cpuc.ca.gov>]  
**Sent:** Tuesday, June 24, 2014 9:48 AM  
**To:** [Redacted] Martinez, Alejandra  
**Cc:** DeVine, Kyle  
**Subject:** RE: PG&E Cases

Great thanks!!

----- Original message -----  
**From:** [Redacted]

Date:06/24/2014 9:43 AM (GMT-08:00)

To: "Martinez, Alejandra"

Cc: "DeVine, Kyle"

Subject: RE: PG&E Cases

Hi, Alejandra,

The account's currently active and in collections. I'm working with customer service to get more information and service options in preparation for our call today.

Talk to you soon!

Regards,

Redacted

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

From: Martinez, Alejandra [<mailto:Alejandra.Martinez@cpuc.ca.gov>]

Sent: Tuesday, June 24, 2014 9:20 AM

To: Redacted

Cc: DeVine, Kyle

Subject: RE: PG&E Cases

Hello Erwin,

Before our call today, can you get some preliminary info on the case I sent you. I will be asking about the current status of the clients account. (It is paid to date, late, in collections, disconnected, etc??)

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

From: Redacted

Sent: Monday, June 23, 2014 5:14 PM

To: Martinez, Alejandra

Cc: DeVine, Kyle

Subject: RE: PG&E Cases

Thanks, Alejandra.. Please let me know your availability tomorrow to discuss the process on how we're going to resolve each of these cases

Please let me know if you're free to chat at 10am?

Regards,

Redacted

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

From: Martinez, Alejandra [<mailto:Alejandra.Martinez@cpuc.ca.gov>]

Sent: Monday, June 23, 2014 3:11 PM

To: Redacted

Cc: DeVine, Kyle

Subject: FW: PG&E Cases

Hey Redacted

The first case that we would like to work is below.

CBO: Central California Legal Services:  
CBO Rep: Nora

Customer Name: Redacted

Account # 3836507416.

She needs payment arrangements and PG&E would not negotiate with Nora.

Thanks for your help.

PG&E is committed to protecting our customers' privacy.  
To learn more, please visit <http://www.pge.com/about/company/privacy/customer/>

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