

From: Dietz, Sidney
Sent: 7/23/2014 1:41:54 PM
To: Miller, Karen (karen.miller@cpuc.ca.gov)
Cc:
Bcc:
Subject: FW: CHANGES Meeting Update

From: Redacted
Sent: Thursday, July 17, 2014 4:51 PM
To: DeVine, Kyle
Cc: Martinez, Alejandra Redacted Miller, Karen; Kaur, Ravneet;
Redacted Dietz, Sidney
Subject: RE: CHANGES Meeting Update

Hi, Kyle and all,

Since our meeting on Tuesday, 7/8, we have been working to review and adopt the 28 Resolution items you have requested into our third-party authorization forms for use by the CBOs in the CHANGES program. We wanted to ensure our Contact Center Operations, particularly, are fully prepared to implement the additional customer authorizations of CBO CHANGES activities to better support future customer-CBO services.

As a result, we have reviewed and revised our existing Form 79-1095 customer authorization form on a preliminary basis to clarify that the majority of the resolution items requested by the Public Advisor can be addressed by the existing language of the form or included with a simple clarification revising the form. Our review also confirmed that, under current customer privacy protections and policies, **eight of the resolution items** will require the customer-of-record to continue to be present with the CBO and directly authorize the change in service for the safety and protection of the LEP customer.

If you approve this interpretation and revision to existing Form 79-1095, we will implement it immediately instead of the non-disclosure certificate required from CBOs and other subcontractors of SHE under the CHANGES program. If you approve, we will also move

forward to consider to streamline Form 79-1095 in our tariffs in order to make this change permanent for purposes of use by CBOs under the CHANGES program.

Assessment:

- The resolution items you requested, in green below, including those relating to providing information and assistance on various utility services, programs and applications (#1 – 12, 20, 21, 27) are already included in the customer authorization provided by Form 79-1095 or include general information or assistance that can be provided to CBOs on specific programs or services. Note that customer authorization for third-parties to sign particular applications for particular programs will depend upon the approved CPUC requirements for the specific program, not Form 79-1095.

- The resolution items you requested relating to payment plans and billing adjustments in amber below (#14, 17 – 19, and 28) are now covered by an additional checkbox on Form, 79-1095 that reads as follows: **“Authorize payment or adjustment of amounts due or overdue on customer’s bill, including setting up or changing a payment plan.”**

- The resolution items you requested in red below (#13,15,16, and 22 - 26) require the Customer of Record to directly authorize the service request and be present on the line to do so.

Resolution Master List

1 HEAP/LiHEAP Application Assistance

2 Energy Assistance Fund Application

3 ESAP Application Assistance

4 Gas Assistance Fund Application Assistance

5 N2N Application Assistance

6 Medical Baseline Application Assistance

7 Educated on avoiding disconnection

8 Bill Education

9 Educated on CARE/FERA

10 Educated on Medical Baseline

11 Educated on Energy efficiency/ Conservation

12 Educated on energy assistance programs

13 Request Meter Service or Testing

14 Bill Adjustment

15 Schedule Customer Service Visit

16 Schedule Energy Audit

17 Set Up/Change Payment Extension

18 Set Up/Change Payment Plan

19 Stop Disconnection

20 Verified Bill

21 Waive/Decrease Deposit

22 Restore Service

23 Sign up for 3rd Party Notification

24 Enrolled in Demand Response Programs

25 Set Up Account

26 Changes to Account

27 REACH Application Assistance

28 Add or Modify Level Pay Plan

Necessary to have Customer of Record (COR) present with CBO for the following resolutions:

13 Request Meter Service or Testing – This requires safety questions to be answered by COR (i.e. dog and access issues)

15 Schedule Customer Service Visit – This requires safety questions to be answered by COR (i.e. dog and access issues)

16 Schedule Energy Audit – This requires safety questions to be answered by COR (i.e. dog and access issues)

22 Restore Service – If the premise has a SmartMeter and has remote capabilities for turn on, CSRs must read the a safety message to ensure the customer corrects any potential safety issues before the scheduled service connection/reconnection to avoid an unsafe condition. Our current policy is this is only allowed with a COR.

#23 Sign Up for 3rd Party Notification – CBO cannot sign up on behalf of customer. CBO can, however, obtain form and have it signed by customer and then forwarded to PG&E.

#24 Enrolled in Demand Response Programs – CBO cannot sign on behalf of customer. CBO can, however, obtain form and have it signed by customer and then forwarded to PG&E.

25 Set up Account – CSRs are trained to ask for full SSN and run through Connect Check to authenticate the customer and also determine if any deposit is required. If SSN is not provided we asked for another form of identification and proceed with charging a deposit.

26 Changes to Account - is very broad, this could lead to all changes on the account (i.e. rate changes, start/stop service, field orders, etc.)

I've attached a mockup of the suggested verbiage on the 79-1095 Form. Please let us know if you have any concerns or want to discuss our assessment. If you're in agreement, we can move forward on our CHANGES update to our CSRs. I'll be off tomorrow and will be returning on Monday, 7/21/14. My supervisor, Tivo Rojas-Cheatham will be available in my absence to help move things along. He can be reached at 415-973-4154.

Thank you for your patience.

Regards,

Redacted

Low Income Programs and Strategies
Pacific Gas and Electric Company

Redacted

Redacted

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

From: DeVine, Kyle [mailto:kyle.devine@cpuc.ca.gov]

Sent: Wednesday, July 16, 2014 7:38 AM

To: [Redacted]

Cc: Martinez, Alejandra; [Redacted] Miller, Karen; Kaur, Ravneet; [Redacted]

Subject: RE: CHANGES Meeting Update

Hi [Redacted]

Thanks for the update, but admittedly I am disappointed that this remains unresolved. Would you please remind your staff that a lot of the resolutions do not involve utility contact because the CBO is able to resolve some things by contacting another assistance agency. Perhaps if they are aware of this, the task would be do daunting. Also would you please remind them that PG&E has not followed the directions in the Commission Resolution since early June and this troubles me.

As always, if you need a follow up meeting, or if you need Alejandra or me to review the resolutions with you, please let us know.

Thanks

Kyle

—

From: [Redacted]

Sent: Tuesday, July 15, 2014 5:00 PM

To: DeVine, Kyle

Cc: Martinez, Alejandra; [Redacted]

Subject: RE: CHANGES Meeting Update

Hi, Kyle,

Hope things are well!

I thought I'd check in with you that the resolutions items are currently being reviewed by management for consistency so that it will be aligned with our Contact Center Operations. I'll have ETA on completion as soon as information's available.

Regards,

[Redacted]

From: [Redacted]

Sent: Friday, July 11, 2014 10:29 AM

To: 'DeVine, Kyle'; Martinez, Alejandra

Cc: Miller, Karen; Kaur, Ravneet; Dietz, Sidney; [Redacted]
[Redacted]

Subject: RE: CHANGES Meeting Update

Good morning, Kyle,

Thanks for checking in . We appreciate your patience as we assess the 28 resolutions in your master list. The comments to be written on the 79-1095 form need to be closely reviewed and vetted so it's clear and consistent for our Contact Center reps. We'll have more information to share early next week, possibly by Tuesday.

Thank you.

Regards,

Redacted

From: DeVine, Kyle [<mailto:kyle.devine@cpuc.ca.gov>]

Sent: Friday, July 11, 2014 7:58 AM

To: Redacted Martinez, Alejandra

Cc: Miller, Karen; Kaur, Ravneet; Dietz, Sidney; Redacted

Redacted

Subject: RE: CHANGES Meeting Update

Good morning PG&E!

I sent this note Wednesday and haven't received a response. Just in case it got lost in cyberspace, I thought I'd send it again and add that if there's no "ETA" yet on your answer, may I have a progress report? Also I remain available, as does Alejandra, if you have any concerns you want to discuss.

Take care,

Kyle

From: DeVine, Kyle

Sent: Wednesday, July 09, 2014 10:35 AM

To: [Redacted] Martinez, Alejandra

Cc: Miller, Karen; Kaur, Ravneet; Dietz, Sidney; [Redacted]
[Redacted]

Subject: RE: CHANGES Meeting Update

Thank you, everyone for the meeting yesterday and the opportunity to bring us closer to conclusion of this “chapter.” [Redac] and the rest of PG&E staff on this email, do you have any estimate of when you might be able to get your changes to us?

Take care

Kyle

From: [Redacted]

Sent: Tuesday, July 08, 2014 4:27 PM

To: DeVine, Kyle; Martinez, Alejandra

Cc: Miller, Karen; Kaur, Ravneet; Dietz, Sidney; [Redacted]
[Redacted]

Subject: RE: CHANGES Meeting Update

Thanks for sharing, Kyle and Alejandra.

Per our discussion, we'll review each type of solution to assess what's covered by Form 79-1095.

Laura,

We'll work offline to discuss the standardized comments that will be appropriate to enable the level of access necessary for the authorization form.

Regards.

Redacted

From: DeVine, Kyle [<mailto:kyle.devine@cpuc.ca.gov>]

Sent: Tuesday, July 08, 2014 3:53 PM

To: Martinez, Alejandra; Redacted

Cc: Miller, Karen; Kaur, Ravneet; Dietz, Sidney; Redacted

Redacted

Subject: RE: CHANGES Meeting Update

Hi,

Just to restate that this ties into our conversation today. Like Alejandra said, obviously CBOs may not need involvement with you for the resolutions that involve other utilities, or even the ones where CBOs don't need to contact a utility for assistance. But we do hope that your one form, with your added language, will cover the rest.

Please let Alejandra know if you need any more information about them. Also, if you have any other questions about the program, we're available for meetings either over the phone or face to face, your preference.

Finally, [Redac] I still haven't been able to locate that organization you were asking about. Sorry, without more information, I can't do anymore.

From: Martinez, Alejandra

Sent: Tuesday, July 08, 2014 3:24 PM

To: [Redacted]

Cc: Miller, Karen; Kaur, Ravneet; Dietz, Sidney; [Redacted]
[Redacted] DeVine, Kyle

Subject: RE: CHANGES Meeting Update

Hello all,

Here is the resolution list that we use for the CHANGES program database. There are a total of 28 resolutions. Some resolutions are utility specific such as Neighbor to Neighbor for SDG&E, so obviously you don't have to worry about those. Please let me know if you have any questions or concerns.

Alejandra

Resolution Master List

1 HEAP/LiHEAP Application Assistance

2 Energy Assistance Fund Application

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4 Gas Assistance Fund Application Assistance

5 N2N Application Assistance

6 Medical Baseline Application Assistance

7 Educated on avoiding disconnection

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16 Schedule Energy Audit

17 Set Up/Change Payment Extension

18 Set Up/Change Payment Plan

19 Stop Disconnection

20 Verified Bill

21 Waive/Decrease Deposit

22 Restore Service

23 Sign up for 3rd Party Notification

24 Enrolled in Demand Response Programs

25 Set Up Account

26 Changes to Account

27 REACH Application Assistance

28 Add or Modify Level Pay Plan

From:

Sent: Monday, July 07, 2014 1:46 PM

To: DeVine, Kyle

Cc: Miller, Karen; Martinez, Alejandra; Kaur, Ravneet; Dietz, Sidney; [Redacted]

[Redacted] Warner, Christopher (Law) [Redacted]

Subject: CHANGES Meeting Update

Hi, Kyle,

Hope this email finds you well.

Thanks for bringing forward your concerns about the NDA and use of 3rd Party Authorization Form.

We need to reschedule our conference call tomorrow to a later date so we can all meet in person.

Please let me know if we can meet later this week or confirm closest availability. We need to have legal counsels present in the discussion as we examine the flexibility in consumer privacy protection and streamlining third party authorization over the phone. These areas require the specialized legal interpretations to see where and how we can move forward.

In the interim, I will still be working with Alejandra to support the customers that are at risk of being disconnected or need special assistance to ensure the best advocacy and resolution of the challenges.

Thank you for helping us coordinate our next meeting.

Regards,

Redacted

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