

## Modified Form 79-1095

### Assessment:

- The resolution items 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 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 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 (does not apply to PG&E)
- 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.)

**Comments:**

Email forms to [CommunityBasedOrga@pge.com](mailto:CommunityBasedOrga@pge.com)

- Processing time: within 2 business days.

Authorized form will allow the CBOs to negotiate payment arrangements and allow CSRs to provide the information verbally.