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Exhibit No.: TERG-0001
Hearing Date: April 5-12,2022
Witness: Karen L. Miller
ALJ: Adeniyi A. Ayoade
Commissioner: John Reynolds

**TESTIMONY OF KAREN L. MILLER
ON BEHALF OF TAHOE ENERGY RATEPAYERS**

FEBRUARY 23, 2022

**BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA**

Application of Liberty Utilities (CalPeco Electric) LLC (U933E), for Authority to Among Other Things, Increase Its Authorized Revenues for Electric Service, Update Its Energy Cost Adjustment Clause Billing Factors, Establish Marginal Costs, Allocate Revenues, And Design Rates, as of January 1, 2022

A.21-05-017
(Filed May 28th, 2021)

**TAHOE ENERGY RATEPAYERS GROUP QUALIFICATIONS
AND PREPARED TESTIMONY OF KAREN L. MILLER
IN OPPOSITION TO LIBERTY UTILITIES (U 933 E) APPLICATION
TO INCREASE ITS AUTHORIZED REVENUES FOR ELECTRIC SERVICE**

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TABLE OF CONTENTS

I. INTRODUCTION..... 3

II. PURPOSE OF TESTIMONY.....4

III. LIBERTY UTILITIES’ PROPOSAL TO BIFURCATE THE CLASSIFICATION OF RESIDENTIAL ENERGY CUSTOMERS INTO TWO CATEGORIES.....5

IV. UPON ACQUISITION OF SIERRA PACIFIC IN 2011, LIBERTY UTILITIES ADOPTED SIERRA PACIFIC’S TARIFF LANGUAGE FOR “SCHEDULE NO. D-1, ITEM 2A” VERBATIM.....12

V. LIBERTY UTILITIES REVEALS THEIR “80% DETERMINATION PRACTICE”13

VI. LIBERTY UTILITIES’ “APPLICATION FOR RESIDENTIAL SERVICE” PROCESS.....19

VII. LIBERTY UTILITIES’ “DECLARATION OF ELIGIBILITY” FOR PERMANENT RESIDENTIAL BASELINE RATES.....21

VIII. "LIBERTY UTILITIES' TRACKING CAPABILITIES"24

IX. SIGNIFICANT CHANGES TO LIBERTY UTILITIES’ RATE DESIGN PROPOSAL, PRESENTED IN “CHAPTER 12: SUPPLEMENTAL DIRECT TESTIMONY” WILL HAVE SIGNIFICANT IMPACT ON RESIDENTIAL CUSTOMERS, HOWEVER, CUSTOMERS HAVE NOT BEEN PROVIDED NOTICE OF THE PROPOSED CHANGES.....24

X. CONCLUSIONS.....26

I. INTRODUCTION

1 **Q.1. Please state your name and business address.**

2 A.1. My name is Karen L. Miller. My business address is 1321 Webster Street, D301,
3 Alameda, California, 94501.

4 **Q.2. By whom are you employed and in what capacity?**

5 A.2. I am self-employed and am testifying on behalf of the Tahoe Energy Ratepayers Group
6 (Tahoe ERG) as an Expert Witness.

7 **Q.3. On whose behalf are you testifying in this proceeding?**

8 A.3. I am testifying on behalf of Tahoe ERG.

9 **Q.4. Please describe your professional and educational experience.**

10 A.4. I have 23 years of experience working in utility regulation. I started with the California
11 Public Utilities Commission (CPUC), in 1983, as a Public Utilities Regulatory Analyst, working
12 as an Expert Witness in Telecommunications Policy and Rate Cases. In 1989, I joined “The
13 Utility Reform Network” (TURN), a non-profit that represents residential utility customers
14 before the CPUC, working as an Expert Witness in Telecommunications Policy and Rate Cases.
15 From 1991 to 2001, I worked in private industry. I returned to the CPUC in 2001, as a Public
16 Utilities Regulatory Analyst. In January of 2005, I was appointed Interim Telecommunications
17 Advisor to Commissioner Dian Gruenich, and in December of 2005, I was appointed as the
18 Public Advisor to the CPUC, a position I held until December 2015.

19 I hold a Bachelors’ degree in Economics from San Francisco State University.

20 **Q.5. Have you previously testified before the California Public Utilities**
21 **Commission?**

22 A.5. Yes. While working for the CPUC from 1983 to 1989, I testified in:

1 A. 83-08-39 – Ponderosa Telephone Company Rate Case

2 D. 85-05-056 – Witness on Rate Design

3

4 A.85-01-034 – Pacific Bell Marketing Abuse Case

5 D.86-05-072 – Witness on Pacific Bell’s Marketing Abuse Activities

6

7 While working for TURN from 1989 through 1991, I testified in:

8 OIL.87-11-033 – Alternative Framework for Local Exchange Carriers

9 D-91-07-044 – Witness on Consumer Education Needs

10

11 A.90-02-060 – ATT Request to Increase the Price of Directory Assistance Calls

12 D.91-03-016 – Witness on Proposed Cost Increase

13

14 **II. PURPOSE OF TESTIMONY**

15 **Q.6. What is the purpose of your direct testimony?**

16 A.6. Tahoe ERG is a California unincorporated association created for the purpose of
17 representing the interests of residential energy customers before the CPUC and other government
18 or regulatory entities’ proceedings. Tahoe ERG advocates for energy rates that unite the
19 interests of Lake Tahoe residential energy users in seeking fair, reasonable, and non-
20 discriminatory electric rates. In this proceeding, Tahoe ERG is advocating for rates that do not
21 discriminate between existing customer classes of (i) Permanent residential customers which
22 Liberty Utilities appears to equate with full-time, existing, or owner-residents of Lake Tahoe on
23 the one-hand, and (ii) Non-permanent residential customers, which Liberty Utilities appears to

1 equate with temporary, part-time, seasonal, renter, or second home-owner residents of Lake
2 Tahoe on the other-hand. I say that Liberty Utilities “appears to equate” certain characteristics
3 with these two customer classes because there is no written document (including Liberty
4 Utilities’ tariff) that provides an exact definition. My testimony will address Liberty
5 Utilities’ flawed proposal to charge Residential-Permanent customers less than Residential-Non-
6 Permanent customers for identical energy usage.

7 I will also address additional changes proposed by Liberty Utilities that will have a
8 significant impact on residential customers. These changes are proposed in Liberty Utilities’
9 “Chapter 12: Supplemental Direct Testimony.” These changes are a proposal to create a \$28 per
10 customer, per month fixed charge to fund wildfire mitigation, and, to add a proposed third
11 pricing tier for residential customers to Liberty Utilities’ Rate Design. Liberty Utilities has not
12 provided notice of these proposed changes to residential customers, and, subsequently,
13 residential customers have not had an opportunity to provide public comment on the proposed
14 changes.

15 **III. LIBERTY UTILITIES’ PROPOSAL TO BIFURCATE THE CLASSIFICATION OF**
16 **RESIDENTIAL ENERGY CUSTOMERS INTO TWO CATEGORIES**

17 **Q.7. What are your conclusions regarding Liberty Utilities’ proposal to bifurcate**
18 **the classification of Residential Energy Customers into two categories?**

19 A.7. I have concluded that Liberty Utilities’ lack of an existing or proposed detailed
20 definition of “Permanent” and Non-Permanent” residential customers is a serious flaw that
21 undermines the validity of Liberty Utilities’ proposed rate design based on these two customer
22 classes.

1 **Q.8. Why does Tahoe ERG believe that detailed definitions of “Permanent” and**
2 **“Non-Permanent” Residential Customers are critical to the accuracy of Liberty Utilities’**
3 **rate design proposals?**

4 A.8. Liberty Utilities based its rate design proposal on the following assumptions:

5 (a) Approximately half of the electricity Liberty delivers is to residential customers and
6 approximately 60 percent of its residential accounts are second vacation homes or
7 rentals.¹

8 (b) Liberty found that the cost of serving the permanent residential rate class is lower
9 than the cost of serving the seasonal residential rate class...²

10 (c) That the cost of serving the permanent residential rate class is \$0.230 per 3 kWh,
11 while the cost of serving the seasonal residential rate class is \$0.251 per kWh, or 4 8.85
12 percent higher.³

13 For Liberty Utilities’ rate design to be accurate, the underlying factual assumptions must
14 be accurate. However, for Liberty Utilities to be able to accurately determine the number of
15 residential customers that fall into the “Permanent” and “Non-permanent” residential customer
16 classes, respectively, Liberty Utilities must have definitions that have adequate specificity to
17 delineate those customer designations without any doubt that the customer is classified correctly.
18 Without such specificity, Liberty Utilities’ proposal is subject to a cascading series of flaws that
19 undermine its entire proposal.

¹ Liberty Energy Rate Application, II. Background, A. Liberty’s Operations

² Chapter 12 – Marginal Cost and Rate Design, Pg. 8, lines 15 - 16

³ Chapter 12 – Marginal Cost and Rate Design, Pg. 9, lines 2 – 4

1 If Liberty Utilities is unable to define the two customer classes, then there is no factual
2 basis for Liberty Utilities’ finding that “approximately 60 percent of its residential accounts are
3 second vacation homes or rentals.”

4 If there is no factual basis for the asserted breakdown of 40% “Permanent” and 60%
5 “Non-permanent” residential customer findings, then Liberty Utilities’ cannot possibly achieve
6 its asserted policy of basing rates on cost causation principles, or its claim that the “cost of
7 serving the permanent residential rate class is lower than the cost of serving the seasonal
8 residential rate class...⁴”.

9 If the Commission cannot trust the accuracy of Liberty Utilities’ claim that the “cost of
10 serving the permanent residential rate class is lower than the cost of serving the seasonal
11 residential rate class,” then we cannot accept Liberty Utilities’ critical finding, upon which their
12 entire Chapter 12 Rate Design is based; the finding “That the cost of serving the permanent
13 residential rate class is \$0.230 per 3 kWh, while the cost of serving the seasonal residential rate
14 class is \$0.251 per kWh, or 8.8 percent higher.”⁵

15 Tahoe ERG believes that due to Liberty Utilities’ lack of proposed or existing definitions
16 for “Permanent” and “Non-permanent Residential Customers, Liberty Utilities’ rate design
17 proposal is based upon significantly flawed assumptions and should not be adopted.

18 **Q.9. Did Liberty Utilities include in their Rate Case Application any definitions,**
19 **analysis, factual or legal basis for how they determined whether a residential customer was**
20 **“Permanent” or “Non-permanent?”**

⁴ Chapter 12 – Marginal Cost and Rate Design, Pg. 8, lines 15 - 16

⁵ Chapter 12 – Marginal Cost and Rate Design, Pg. 9, lines 2 – 4

1 A.9. No. On behalf of Tahoe ERG, I carefully reviewed Liberty Utilities’ Rate Case
2 Application to find and understand the factual and legal basis for Liberty Utilities’ proposal,
3 including definitions, and found no definitions, analysis, factual or legal basis used by Liberty
4 Utilities in their determination of whether a residential customer was “Permanent” or Non-
5 Permanent.”

6 **Q.10. Did Tahoe ERG request that Liberty Utilities provide Tahoe ERG an existing**
7 **or proposed detailed definition of “Permanent” and Non-Permanent” residential**
8 **customers, or any analysis, data or workpapers used in the determination or such**
9 **classifications?**

10 A.10. Yes. On November 5, 2021, Tahoe ERG served upon Liberty Utilities “Tahoe
11 Energy Ratepayers’ Group Second Set of Data Requests to Liberty Utilities (U 93 E)” (Tahoe
12 ERG 2nd DR). The due date for Liberty Utilities’ response to the data request was November 19,
13 2021. Tahoe ERG received their late response on December 3rd, 2021, with follow up
14 information provided on January 20th.

15 In addition, on January 11, 2022, Tahoe ERG served upon Liberty Utilities “Tahoe
16 Energy Ratepayers’ Group Third Set of Data Requests to Liberty Utilities (U 93 E)” (Tahoe
17 ERG 3rd DR). The due date for Liberty Utilities’ response to the Data Request was January 27th,
18 2022. Tahoe ERG received some partial answers from Liberty Utilities as a result from a “Meet
19 and Confer,” requested by Tahoe ERG on January 25th, with additional information on January
20 28th, 2022. However, the full data request response was not received until February 4th, 2022.

21 **Q.11. Does Liberty Utilities use consistent terminology for their two classes of**
22 **Residential Customers throughout their filing?**

1 A.11. No. Tahoe ERG was concerned as the terminology was inconsistent throughout
2 documents and therefore, asked Liberty Utilities for clarification. Liberty Utilities stated in
3 response to Request No. 5 and Request No. 6 of Tahoe ERG’s 2nd DR, “As an initial matter,
4 “Non-Permanent” residential customers are referenced as “Seasonal” residential customers in
5 certain places. There is no difference between “Non-permanent” residential customers and
6 “Seasonal” residential customers. They are one in-in-the-same.”

7 **Q.12. What terms will Tahoe ERG use in its testimony in this proceeding?**

8 A.12. Tahoe ERG had used the term “Seasonal” in Tahoe ERG 2nd DR so it may show
9 up in excerpts in this testimony. However, Tahoe ERG will use the terms “Permanent”
10 residential customer and “Non-permanent” residential customer, in the non-excerpt portions of
11 this testimony.

12 **Q.13. Did Liberty Utilities’ responses to Tahoe ERG’s 2nd DR and 3rd DRs,
13 including the answers provided on January 25th and January 28th, provide the
14 missing/incomplete definitions, analysis, workpapers and data?**

15 A.13. No. Liberty Utilities’ responses to Tahoe ERG 2nd DR and 3rd DRs, including the
16 answers provided on January 25th and January 28th, did not provide the missing/incomplete
17 definitions, analysis, workpapers and data.

18 **Q.14. Please elaborate?**

19 A.14. In Tahoe ERG’s 2nd DR, we requested Liberty Utilities provide detailed definitions
20 of “Permanent” and “Non-Permanent” residential customers. Liberty Utilities’ replies to
21 Requests 2-1 through 2-4 all referred Tahoe ERG to, “Schedule No. D-1, Sheet No. 77, Item 2A”
22 (Attachment 1) of the Company’s tariff that describes the eligibility requirements for
23 “Permanent” residential and “Non-permanent” residential customers.” The referred to section

1 is as follows:

2 “A. Eligibility. Baseline quantities are available only to separately metered, permanent
3 Residential Customers. Non-permanent Customers such as recreational or vacation home
4 customers are not eligible. The Utility may require Customers to complete and file with it
5 an appropriate Declaration of Eligibility for baseline quantities. The Utility may also
6 require proof of permanent residency, such as voter registration or property tax
7 exemption. The penalty for presenting false information in this declaration shall be any
8 legal action which the Utility might elect to pursue.”

9 **Q.15. Does Tahoe ERG believe this to be an adequate response?**

10 A.15. No. Tahoe ERG does not believe this to be an adequate response, as:

11 (a) Liberty Utilities does not provide a definition of “Permanent Residential Customer.”

12 (b) Liberty Utilities does not provide a definition of “Non-Permanent Residential
13 Customer.”

14 (c) Instead of a definition, Liberty Utilities uses two, undefined, descriptor terms to
15 describe “Non-Permanent Residential Customer.”

16 (d) The wording of the sentence in which the two descriptor terms are presented implies
17 that there are additional, but unmentioned, descriptor terms that are used by Liberty
18 Utilities, i.e., “...such as recreational or vacation home customers...” creating further
19 lack of specificity.

20 (e) Liberty does not provide definitions for any of the descriptor terms used in “Schedule
21 No. D-1, Sheet No. 77, Item 2A” of the Company’s tariff.

22 In addition, Liberty Utilities has not provided definitions of any of the descriptor terms
23 they use for “Non-permanent customers,” in their testimony and filed exhibits. Those descriptor

1 terms are: “recreational home,” “vacation home,” “second home,” “seasonal customer” and
2 “rentals.”

3 **Q.16. Did Tahoe ERG attempt to find definitions beyond the responses provided by**
4 **Liberty Utilities in their Rate Case Application and Data Request Responses?**

5 A.16. Yes. In an attempt to find definitions, Tahoe ERG conducted its own review of
6 information available on Liberty Utilities’ public website. Tahoe ERG examined the contents of
7 “Liberty Utilities – Detailed Glossary of Terms – California,” “Liberty Utilities – Budget
8 Glossary of Terms,” and, “Liberty Utilities – Rule 1 – Definitions.” In addition, Tahoe ERG
9 reviewed training materials used by customer service representatives who interact with
10 customers to determine whether they should be classified as Permanent or Non-permanent.
11 Tahoe ERG was not able to locate definitions or employee guidance for any of the terms
12 discussed above.

13 Tahoe ERG concludes that the lack of definitions in Liberty Utilities’ response to Tahoe
14 ERG’s Data Request Responses and the lack of definitions on Liberty Utilities’ website and in
15 their tariffs significantly contribute to Liberty Utilities’ inability to accurately characterize which
16 residential customer is a “Permanent” or “Non-permanent” customer.

17 **Q.17. Did Liberty Utilities provide analysis, workpapers or data on how they**
18 **determined how many residential customers fell into each class?**

19 A.17. No. Not at all. In fact, our Counsel has advised me, and I incorporated into my
20 testimony, that, during a January 20th “Meet and Confer” attended by Tahoe ERGs’ Counsel, Ms.
21 Anita Taff-Rice, Mr. Timothy Lyons, the Author of Chapter 12 of Liberty Utilities’ Rate Design
22 Proposal, and Liberty Utilities’ Attorneys, Mr. Lyons stated that “he did not participate in
23 dividing customers into the permanent or non-permanent class. He said Liberty Utilities

1 provided to him customer data that already coded customers as being either permanent or non-
2 permanent.” I found this to be quite shocking. It appears that Liberty Utilities did not even
3 provide definitions, workpapers or analysis on the definitions of “Permanent” and “Non-
4 permanent” residential customers to the author of its proposed Rate Design.

5 Tahoe ERG believes that due to Liberty Utilities’ lack of proposed or existing definitions
6 for “Permanent” and “Non-permanent Residential Customers, and the complete lack of analysis,
7 data or workpapers documenting how Liberty Utilities’ classified its Residential Customers into
8 “Permanent” and “Non-permanent” customers, Liberty Utilities’ rate design proposal is based
9 upon flawed assumptions and should not be adopted.

10 **IV. UPON ACQUISITION OF SIERRA PACIFIC IN 2011, LIBERTY UTILITIES**
11 **ADOPTED SIERRA PACIFIC’S TARIFF LANGUAGE FOR “SCHEDULE NO. D-1,**
12 **ITEM 2A” VERBATIM**

13 **Q.18. What other concerns does Tahoe ERG have regarding the lack of specific**
14 **definitions for “Permanent” and “Non-Permanent” resident Customers?**

15 A.18. Liberty Utilities’ stated in their response to 3.a. of Tahoe ERG’s 3rd DR, “The
16 tariff provisions that in question [sic] were part of the CPUC-approved Sierra Pacific Power Co
17 (“SPPC”) Tariffs that were in place and subsequently adopted by Liberty after its acquisition of
18 the service territory in 2010, included in the tariff package provided and approved by the CPUC
19 in D.10-10-017, OP 6, which called for the filing of AL 1-E on November 1, 2010.”

20 Tahoe ERG compared the “Schedule No. D-1, Item 2A” of Liberty Utilities’ tariff to the
21 “Schedule No. D-1, Item 2A” (Attachment 2) included in Sierra Pacific Power Companies’
22 tariffs and adopted by Liberty Utilities on January 1, 2011. The wording is verbatim. And,
23 although the numbering system on Liberty Utilities’ tariff sheet indicates that changes have been

1 made to Schedule No. D-1, since the purchase of the company, Liberty Utility has not added
2 clarity or specific definitions to Section 2.A. Liberty Utilities has not provided Tahoe ERG with
3 anything from Sierra Pacific Power Company documenting why and how Sierra Pacific
4 bifurcated their Residential Customer Rate into “Permanent” and “Non-permanent.” It appears
5 that Liberty Utilities is unaware what analysis and reasoning went into Sierra Pacific’s
6 bifurcation of its Residential Customer Class.

7 **V. LIBERTY UTILITIES REVEALS THEIR “80% DETERMINATION PRACTICE”**

8 **Q.19. Did Liberty Utilities provide any additional criteria that they use to**
9 **determine whether a customer’s dwelling is classified as a “permanent residential unit?”**

10 A.19. Yes. Tahoe ERG continued to press for a further detailed explanation in Tahoe
11 ERG DR 3-4f., and asked Liberty Utilities to “Identify any criteria, besides the eligibility
12 requirements in Schedule No. D-1, Sheet No. 77, 2A that You use to determine whether a
13 customer’s dwelling is classified as a “permanent residential unit.” The first sentence in Liberty
14 Utilities’ response was “See generally, Rule 1 definition of “Permanent Service.” The definition
15 provided reads: “Permanent Service: Service which, in the opinion of the Utility, is of a
16 permanent and established character. This may be continuous, intermittent, or seasonal in
17 nature.”

18 **Q.20. Does Liberty Utilities’ definition of “Permanent Service” provide clarification**
19 **for the further use of the terms “Permanent” and “Non-permanent” to classify residential**
20 **customers?**

21 A.20. No. In fact, the remainder of Liberty Utilities’ response to Tahoe ERG DR 3-4.f.,
22 creates even more confusion about how Liberty Utilities defines “Permanent” and “Non-
23 permanent” residential customers. Liberty Utilities reveals for the first time, a nonwritten

1 practice that uses an unsubstantiated 80% determination factor to divide residential customers
2 into “Permanent” and “Non-permanent” classes. Liberty states that: “Liberty will typically rely
3 on information related to the premises, the applicable zoning for the structure, information from
4 the time service is established from the prospective Customer as to the nature of activity at the
5 Premises. **If the customer intends to reside in the dwelling more than 80% of the time, the
6 dwelling is considered ‘Permanent Service.’ The 80% determination is not a written policy
7 but a current practice.** The customer is provided the form ‘Declaration of Eligibility for
8 Permanent Residential Baseline Rates’ (Attachment 3) that states they are signing under oath and
9 will need to have the form notarized. The form also states it is unlawful for an individual to
10 receive a Permanent Residence Baseline Allowance for more than one residence in the state of
11 Californian. The CSR is not required to calculate the 80% since the customer is signing the
12 document under oath.” (Emphasis added.)

13 **Q.21. What is Tahoe ERG’s response to Liberty Utilities’ additional criteria that**
14 **“If the customer intends to reside in the dwelling more than 80% of the time, the dwelling**
15 **is considered ‘Permanent Service?’”**

16 A.21. Tahoe ERG was quite surprised and concerned about Liberty Utilities revelation of
17 an unwritten “80% Determination Practice.” The “80% Determination practice” was not
18 mentioned at all in Liberty Utilities’ Rate Application or testimony. It is not mentioned on
19 Liberty Utilities’ website, or in Liberty Utilities’ tariffs, nor reflected in any of the limited
20 Customer Service training documentation provided by Liberty Utilities in discovery.

21 However, most concerning was that it was not mentioned at all in Liberty Utilities’
22 response to Tahoe ERG 2nd DR, even though Requests No. 2-1 to 2-4 all requested “detailed
23 definitions of ‘Residential-Permanent’ and ‘Residential-Seasonal customer’ as used in the

1 original Chapter 12 of their filing, the Chapter 12: Supplemental Direct Testimony, the overall
2 Rate Case filing and, in all versions of the Marginal Cost Study.

3 In fact, in Liberty Utilities’ response to Request No. 1, to Tahoe ERG 2nd DR it refers to
4 “Schedule No. D-1, Sheet No. 77, Item 2A of the Company’s tariff that describes **the eligibility**
5 **requirements** for Permanent Residential and Non-Permanent Residential customers.” And
6 Liberty Utilities’ responses to Requests No. 2-2 to 2-4, all state, “Please refer to the Company’s
7 response to 2-1. **The eligibility requirements** for Permanent Residential and Non-Permanent
8 Residential customers are the same...”. (Emphasis added.)

9 The “80% Determination practice” is not included in “Schedule No. D-1, Sheet No. 77,
10 Item 2A, of the Company’s tariff, despite Liberty Utilities’ claims that Schedule No. D-1
11 describes **the eligibility requirements** for Permanent Residential and Non-Permanent
12 Residential customers.” However, as the “80% Determination practice” is clearly an eligibility
13 requirement, and apparently the key determinate of how Liberty Utilities classifies “Permanent”
14 vs “Non-Permanent” residential service, it certainly should have been provided to Tahoe ERG in
15 Liberty Utilities’ responses to Tahoe ERG 2nd DR. It just came out of nowhere, suddenly
16 appearing in Liberty Utilities’ response to Tahoe ERG’s 3rd DR. Therefore, Tahoe ERG must
17 conclude that the “80% Determination practice” was created by Liberty Utilities in between the
18 date Liberty Utilities answered Tahoe ERG’s 2nd DR and the date Liberty Utilities answered
19 Tahoe ERG’s 3rd DR. (Emphasis added.)

20 Liberty Utilities’ “80% Determination practice” revelation was not accompanied by
21 documentation as to when and why it was developed and implemented. There was no indication as
22 to the legal and policy analyses upon which it is based. Liberty Utilities states that it is “**not a**
23 **written policy but a current practice**” and provides no details as to how the practice is used

1 within Liberty Utilities’ Residential Customer Application Process. It is not known if and how
2 Consumer Service Representatives apply the “80% Determination practice” during the
3 Residential Customers Application Process. (Emphasis added.) It is not known whether this
4 “80% Determination practice” was used to derive the asserted customer breakdown of 40%
5 Permanent and 60% Non-permanent residential customers that underlies Liberty Utilities’ entire
6 rate design and pricing proposal.

7 Tahoe ERG is flabbergasted that Liberty Utilities would roll out such a controversial “**not**
8 **a written policy but a current practice**” at this time. (Emphasis added.)

9 Liberty Utilities is in the middle of a Rate Case proceeding, near the end of discovery and
10 on the cusp of testimony being served. Tahoe ERG cannot even come up with any hypothetical
11 suggestions as to why Liberty Utilities believes using an unwritten practice of unknown origin
12 and application could possibly serve as a proper basis for rate design – particularly one that
13 seriously penalizes Non-permanent residents with an extremely large rate increase.

14 Tahoe ERG has numerous concerns.

15 First, the “80% determination practice” appears to be quite stringent and aggressive.
16 Tahoe ERG again notes that there are no citations as to the policy or legal basis for using the
17 “80% determination practice.” To stay within the 80% requirement, a resident could only be
18 away from their residence a total of 73 days per year, which equates to a total of 2.43 months per
19 year. Tahoe ERG can think of a myriad of situations where any resident’s cumulative vacations,
20 business trips and other life situations, such as receiving medical treatment, could in any given
21 year, have them away from their residence for more than a total of 2.43 months in a year. The
22 Federal government and many states use a minimum 183-day rule for establishing residency
23 requirements for the purposes of taxes. Yet, Liberty Utilities’ uses a minimum 292-day rule for

1 establishing residency requirements for Baseline Energy service, without a known legal or policy
2 basis.

3 Second, Tahoe ERG believes that this newly introduced “80% Determination practice”
4 adds an additional and significant level of confusion to the already extremely nonspecific process
5 of how Liberty Utilities attempts to classify Residential Customers into “Permanent” and “Non-
6 permanent” Customers. Given that the practice is, “not a written policy but a current practice,”
7 and was introduced with no documentation or explanation, it is not known where or how in the
8 Customer Application process the application of the practice occurs. It is not known if Customer
9 Service Representatives are even trained on this practice. There is literally nothing that has been
10 provided by Liberty Utilities that provides any detail on anything about the “80% Determination
11 practice” other than that it exists and that it is “not a written policy but a current practice.” Tahoe
12 ERG argues that there is clear opportunity for a selective application of the “80% Determination
13 practice.” There are no written rules or limits here. The potential harm to Residential customers
14 overall is grave.

15 Third, it is wrong that customers have no knowledge that Liberty Utilities uses the
16 punitive “80% Determination practice” in the Customer Application Process. It is not hard to
17 imagine that some customers have been placed in the wrong customer class due to a lack of
18 understanding of the “80% Determination practice” and by almost certain inconsistent
19 application by untrained customer service representatives applying an unwritten practice. A
20 customer is entitled to know if there are criteria that are being used to determine their eligibility
21 for Baseline Service. A customer is entitled to “just and reasonable rates.” A customer should
22 have the opportunity to think about their answer before they are somehow classified as a Non-
23 permanent residential customer and forced to pay significantly higher utility bills. The customer

1 might be confused by a question or led on by a Customer Service Representative. Given that it is
2 “not a written policy but a current practice” creates a situation ripe for mischief.

3 Fourth, Tahoe ERG finds it confusing and contradictory that Liberty Utilities created
4 their “80% determination practice” under the auspices of their Rule 1 Definition of “Permanent
5 Service: Service which, in the opinion of the Utility, is of a permanent and established character.
6 This may be continuous, intermittent, or seasonal in nature.” If “permanent service...may be
7 continuous, intermittent, or seasonal in nature,” it seems wrong that a customer, who has their
8 service on for the entire year, but is gone from the premises less than 80% of the year, is a
9 classified as a “Non-permanent” customer? It is also confusing that the definition of permanent
10 service uses the term “seasonal” even though Liberty Utilities stated that for purposes of this rate
11 case, the term Non-permanent is synonymous with Seasonal.

12 Finally, Tahoe ERG is extremely concerned about Liberty Utilities’ built-in incentive to
13 incorrectly categorize their Residential customers as “Non-permanent” customers. Liberty
14 Utilities’ proposed rate design would charge “Non-Permanent” customers a significantly higher
15 rate than “Permanent” customers. The more residential customers designated “Non-permanent,”
16 the greater Liberty Utilities’ ability to earn their proposed revenue requirement. The last-minute
17 announcement of a “80% determination practice (that) is not a written policy but a current
18 practice,” adds to Tahoe ERG’s concerns that Liberty Utilities’ determination of “Non-
19 permanent” residential customers may not be fair and equitable.

20 Tahoe ERG concludes that Liberty Utilities should be required to present its legal and
21 policy basis used to justify the “80% determination practice” as well as provide clarification and
22 documentation as to when the “80% determination practice” went into effect and exactly how it
23 is being applied when residential customers request new service or request changes made to their

1 service. Liberty Utilities should be required to have its “80% Determination practice” formalized
2 through the CPUC Tariff process.

3 **VI. LIBERTY UTILITIES’ “APPLICATION FOR RESIDENTIAL SERVICE”**

4 **PROCESS**

5 **Q.22. Would Tahoe ERG like to address Liberty Utilities’ “Application for** 6 **Residential Service” Process?**

7 A.22. Yes. Tahoe ERG reviewed Liberty Utilities’ Public Website, their Tariffs, Rules,
8 Definitions and the “CSR Frontline – Service Request” form (Attachment 4) and other process
9 documents. (I believe CSR means Consumer Service Representative. CSR process documents
10 were sent to Tahoe ERG on January 25th, without explanations as to how they are used.) (See
11 Attachments.) Tahoe ERG cannot identify a specific point in the “Application for Residential
12 Service process” whereupon Liberty Utilities provides a detailed definition to a potential or
13 existing customer of what is meant by Liberty Utilities when the customer is asked whether they
14 will be, or already are, a “Permanent” or “Non-permanent” resident in their dwelling or informs
15 the customer about the “80% Determination practice”. Tahoe ERG cannot identify a written
16 application for a customer to review and fill out online. Liberty Utilities’ website states that all
17 offices are closed to customers due to Covid. It appears that to initiate or change service, a
18 potential/existing customer must place a call to Liberty Utilities.

19 Tahoe ERG reviewed Liberty Utilities’ “CSR Frontline – Service Request,” which Tahoe
20 ERG believes is the script that a service representative uses when initiating or changing service
21 for a customer. Included in the script are questions, such as “Are you Purchasing or Renting?”
22 “Have you had service with us before?” There is a lengthy set of prompts for discussion about
23 the ways a deposit can be waived. There are spaces for personal information, service address,

1 date to start service, employer, etc. And, then there is the line for Primary or Non Primary
2 Residence, which shares the line with a question about there being a dog on the premise. Here is
3 how it appears on the form:

4 **PRIMARY or NON PRIMARY RESIDENCE / IS THERE A DOG ON THE PREMISE?**
5 **YES NO**

6 There are no prompts to clarify with the customer what is being asked. There is no information
7 on the difference between “Primary” and “Non Primary Residences.” There is no prompt of the
8 “80% Determination practice” to assist the service representative in their discussion.

9 Here, Tahoe ERG makes three “observations” rather than “statements” as the company process
10 information provided to Tahoe ERG by Liberty Utilities is very limited and not conclusive.

11 Observations:

12 (a) It appears that Liberty Utilities bases the initial classification on whether a residence is
13 “permanent” or “non-permanent” on whatever discussion the customer service
14 representative has with the customer. It is not clear what circumstances would cause the
15 Service Representative to classify a customer as “Non-permanent.” It is not clear when
16 and how they apply the “80% Determination practice.” The discussion between the
17 customer and Customer Service Representative may or may not be reflected in notes
18 taken by a Service Representative.

19 (b) It does not appear that Liberty Utilities informs customers that they use an “80%
20 Determination practice” to classify the customers into “Permanent” or Non-permanent”
21 categories.

22 (c) It does not appear that Liberty Utilities informs customers who are classified as “Non-
23 permanent” residential customers that they can apply to change their classification if their

1 residence status changes.

2 **Q.23. What does Tahoe ERG conclude from their review of Liberty Utilities’**
3 **“Application for Residential Service” Process?**

4 A.23. Tahoe ERG concludes that Liberty Utilities’ “Application for Residential Service”
5 process, as presented by Liberty Utilities in the documents provided to Tahoe ERG, is an
6 additional example of the extremely nonspecific process of how Liberty Utilities attempts to
7 classify Residential Customers into “Permanent” and “Non-permanent” Customers. The lack of
8 detailed processes is very concerning. Tahoe ERG again concludes that the resulting lack in
9 Liberty Utilities’ ability to accurately characterize which residential customer is a “Permanent”
10 or “Non-permanent” customer results in significant flaws in Liberty Utilities’ rate design
11 proposal.

12 **VII. LIBERTY UTILITIES’ “DECLARATION OF ELIGIBILITY FOR PERMANENT**
13 **RESIDENTIAL BASELINE RATES**

14 **Q.24. Would Tahoe ERG like to address Liberty Utilities’ “DECLARATION OF**
15 **ELIGIBILITY FOR PERMANENT RESIDENTIAL BASELINE RATES.”**

16 A.24. Yes. Liberty Utilities’ “DECLARATION OF ELIGIBILITY FOR PERMANENT
17 RESIDENTIAL BASELINE RATES” (“Baseline Declaration”) appears to be the key document
18 used by Liberty Utilities to enforce its policies on “Permanent” and “Non-permanent” residential
19 customers. It does not appear that Liberty Utilities provides the “Baseline Declaration” to
20 customers when they initially sign up for residential energy service. However, a change in
21 billing address to an address outside of Liberty Utilities’ service area will trigger a letter
22 informing a customer that Liberty Utilities knows that the customer’s address has been changed
23 to one that is outside of the service area (See Attachment 5); or that Liberty Utilities has received

1 a Mailing address change for the account from the United State Postal Service. (See Attachment
2 6.). The letter also states, in part: “therefore we will be changing your rate from a permanent to a
3 non-permanent baseline status. If this is your primary residence and the status change is in error,
4 please complete the enclosed form, have your signature **notarized** and return in the envelope
5 provided. The primary baseline rate will be reinstated upon our receipt of the completed form.”

6 Tahoe ERG has the following concerns about the “Baseline Declaration:”

7 (a) It requires the applicant to “hereby declares under oath that the quantities of electric
8 energy which are being requested are for use at a permanent, full time, primary residence
9 of the applicant. The applicant also declares that this residence is not a recreation,
10 vacation or second home.”

11 Liberty Utilities should not be requiring customers to swear under oath, and then get the
12 oath notarized, when what they are swearing to are undefined terms.

13 (b) The applicant is not notified that Liberty Utilities is applying an “80% Determination
14 practice.”

15 (c) It states: “**WARNING:** It is unlawful for an individual to receive a Permanent
16 Residential Baseline Allowance for more than one residence in the State of California.”
17 Tahoe ERG has done an extensive on-line search and has not been able to find any law in
18 California related to receiving a Permanent Residential Baseline Allowance. Tahoe ERG
19 was not able to find a citation to such a law on the “Declaration” document or on Liberty
20 Utilities’ website. If there is such a law, Liberty Utilities’ must provide a cite. If no law
21 exists, Liberty Utilities must be immediately stopped from sending out the “Baseline
22 Declaration” and threatening customers with a non-existent law.

23 (d) It states: “In the event Liberty Utilities...discovers that a customer is receiving more than

1 one allowance, (either from Liberty or another electric utility), the company is required
2 by its rules and regulations to prosecute said customer to the full extent of the law.”

3 This statement is false. In “Schedule No. D-1.2. A., it states in part: “The Utility may
4 require Customers to complete and file with it an appropriate Declaration of Eligibility
5 for baseline quantities. The Utility may also require proof of permanent residency, such
6 as voter registration or property tax exemption. **The penalty for presenting false
7 information in this declaration shall be a legal action which the Utility might elect to
8 pursue.**” (Emphasis added.) The company is **NOT** required by its rules and regulations
9 to prosecute said customer to the full extent of the law.

10 In addition, in Tahoe ERG 3rd DR, Request 3- 9(c), Tahoe ERG requests that Liberty
11 Utilities: “Identify the type of legal action that might be taken against an individual who You
12 have determined provided false information.” Liberty Utilities responded: Upon establishing
13 services, Liberty gathers information from the customer and does a positive identification check
14 through Equifax-Full Name, Social Security number, mailing address, phone number, date of
15 birth and email address. If the customer’s information matches, then they are established. If the
16 information that the customer provided does not match, then 2 notarized governments IDs are
17 needed before proceeding.”

18 The action Liberty Utilities takes in response to a customer who may be providing
19 incorrect information is hardly as severe as Liberty Utilities implies when it states that “the
20 company is required by its rules and regulations to prosecute said customer to the full extent of
21 the law.”

22 Tahoe ERG believes that Liberty Utilities is taking an unnecessarily harsh and
23 threatening position with residential customers. Intimidating customers is not good policy.

1 Indeed, it is not fair nor correct to deem the information false if the terms of that information are
2 not defined or not communicated to the customer.

3 **VIII. LIBERTY UTILITIES' TRACKING CAPABILITIES**

4 **Q.25. Would you like to comment on Liberty Utilities' lack of tracking capabilities?**

5 A.25. Yes. In response to Tahoe ERG 3rd DR, Liberty Utilities stated in response to
6 Request No. 3-7(d) that they do not track the number of customers from whom they requested a
7 "Declaration of Eligibility" in 2020 and 2021 respectively. Liberty Utilities stated in response to
8 Request No. 8(e) that they do not track the number of customers from whom they requested
9 "proof of permanent residency" in 2020 and 2021 respectively. Finally, Liberty Utilities stated
10 in response to Request No. 9(d) that they do not track the number of customers They
11 "determined provided false information" in 2020 and 2021 respectively.

12 Tahoe ERG recommends that the CPUC direct Liberty Utilities to track the data listed
13 above. Tahoe ERG believes that it would provide valuable insight into the extent of any problem
14 Liberty Utilities customers are having with being placed into an incorrect category and their
15 effort to correct the error.

16 **IX. SIGNIFICANT CHANGES TO LIBERTY UTILITIES' RATE DESIGN PROPOSAL,**
17 **PRESENTED IN "CHAPTER 12: SUPPLEMENTAL DIRECT TESTIMONY" WILL**
18 **HAVE SIGNIFICANT IMPACT ON RESIDENTIAL CUSTOMERS, HOWEVER,**
19 **CUSTOMERS HAVE NOT BEEN PROVIDED NOTICE OF THE PROPOSED**
20 **CHANGES**

21 **Q.26. Would you like to address significant proposed changes to Liberty Utilities'**
22 **Rate Design Proposal on which customers have not been provided notice?**

1 A.26. Yes. In Liberty Utilities “Chapter 12: Supplemental Direct Testimony” it proposes
2 significant changes to its original Rate Design Proposal that had been previously submitted in
3 Liberty Utilities’ initial Rate Case Application “Chapter 12: Marginal Cost and Rate Design.”
4 The proposed changes include: a proposal to create a \$28 per customer, per month, fixed charge
5 to fund wildfire mitigation; and, to add a proposal to add a third pricing tier for residential
6 customers. As far as Tahoe ERG has been able to ascertain, Liberty Utilities has not provided
7 notice of these proposed changes to residential customers, and, subsequently, residential
8 customers have not had an opportunity to provide public comment on the proposed changes.

9 Tahoe ERG knows that Liberty Utilities provided notice to customers on their initial Rate
10 Case Application and held a Public Participation Hearing on August 23, 2021, in South Lake
11 Tahoe. I have read the Public Comments posted online in the record for this proceeding, of
12 which there are 160 as of February 20, 2022. The comments show that many customers had
13 issues and concerns with the initial Rate Design Proposal, such that they took the time to send
14 their comments to the CPUC. The last of the comments posted to this proceeding record is dated
15 October 28, 2021. It appears that the comments were made in response to the customer notice
16 and Public Participation Hearings.

17 No. 10 of the Rate Design Principles, set forth by the CPUC in D.15-07-001,⁶ states: “10.
18 Transitions to new rate structures should emphasize customer education and outreach that
19 enhances customer understanding and acceptance of new rates and minimizes and appropriately
20 considers the bill impacts associated with such transitions.”

21 To be consistent with the Rate Design Principles, Liberty Utilities should, at a minimum,
22 be required to provided notice on the new proposed changes to its Rate Design Proposal.

⁶ D.15-07-001, at p. 28 (July 3, 2015) (mimeo)

1 Customers should be given an opportunity to provide the CPUC and Liberty Utilities with their
2 comments on the revised proposal, prior to the CPUC decision on Liberty Utilities’ revised Rate
3 Design Proposal.

4 **X. CONCLUSIONS**

5 **Q.27. What are your conclusions?**

6 A.27. Tahoe ERGs’ Conclusions are:

7 1. Liberty Utilities was not able to provide definitions for “Permanent” and “Non-permanent”
8 Residential Customers that included adequate details and specificity to determine, without
9 question, that a customer met one of the classifications, and that the customer understood exactly
10 why they were put into a specific classification. A correct and documented breakdown of the
11 number of residential customers classified as “Permanent” and “Non-Permanent” is critical to the
12 accuracy of Liberty Utilities’ Rate Design Proposal. Liberty Utilities’ complete inability to
13 accurately characterize which residential customer is a “Permanent” or “Non-permanent”
14 customer results in significant flaws in Liberty Utilities’ Rate Design Proposal. Liberty’s Rate
15 Design Proposal should be rejected.

16 2. In Liberty Utilities’ responses to Tahoe ERG Data Requests and in a “Meet and Confer”
17 with Tahoe ERG’s Counsel, Liberty Utilities provided multiple examples of the inexactness of
18 the process and policies it uses to attempt to characterize which residential customer is a
19 “Permanent or “Non-Permanent” customer. Liberty Utilities’ complete inability to accurately
20 characterize which residential customer is a “Permanent” or “Non-permanent” customer results
21 in significant flaws in Liberty Utilities’ Rate Design Proposal. Liberty’s Rate Design Proposal
22 should be rejected.

1 3. Liberty Utilities “Chapter 12: Supplemental Direct Testimony” proposed significant
2 changes to the Rate Design Proposal it had previously submitted in Liberty Utilities’ initial Rate
3 Case Application “Chapter 12: Marginal Cost and Rate Design.” The proposed changes include:
4 a proposal to create a \$28 per customer, per month, fixed charge to fund wildfire mitigation; and,
5 to add a proposal to add third pricing tier for residential customers. It does not appear that
6 Liberty Utilities has provided notice of these proposed changes to residential customers, and,
7 subsequently, residential customers have not had an opportunity to provide public comment on
8 the proposed changes.

9 No. 10 of the Rate Design Principles, set forth by the CPUC in D.15-07-001,⁷ states:
10 “10. Transitions to new rate structures should emphasize customer education and outreach that
11 enhances customer understanding and acceptance of new rates and minimizes and appropriately
12 considers the bill impacts associated with such transitions.”

13 To be consistent with the Rate Design Principles, Liberty Utilities should, at a minimum, be
14 required to provide customer notice on the new proposed changes to its Rate Design Proposal.

15 5. Liberty Utilities revealed, very late in the Discovery process, a new practice instituting
16 new eligibility requirements for customers in determining whether to classify the customer as
17 “Permanent” or “Non-permanent.” The practice, which we have coined as the “80%
18 Determination practice” states: **If the customer intends to reside in the dwelling more than**
19 **80% of the time, the dwelling is considered ‘Permanent Service.’ The 80% determination**
20 **is not a written policy but a current practice.** This practice was revealed in response to Tahoe
21 ERGs’ 3rd DR and was not accompanied by documentation as to when and why it was developed
22 and implemented. The was no indication as to the legal and policy analyses upon which it is

⁷ D.15-07-001, at p. 28 (July 3, 2015) (mimeo)

1 based. Liberty Utilities states that it is “**not a written policy but a current practice**” and
2 provides no details as to how the practice is used within Liberty Utilities’ Residential Customer
3 Application Process. It is not known if and how Consumer Service Representatives apply the
4 “80% Determination practice” during the Residential Customers Application Process.

5 (Emphasis added.)

6 Tahoe ERG concludes that Liberty Utilities should be required to present its legal and
7 policy basis used to justify the “80% Determination practice” as well as provide clarification and
8 documentation as to when the “80% Determination practice” went into effect and exactly how it
9 is being applied when residential customers request new service or request changes made to their
10 service. Liberty Utilities should be required to have its “80% Determination practice” formalized
11 through the CPUC Tariff process.

12 6. Tahoe ERG concludes that the inexactness of Liberty Utilities’ definitions and lack of
13 clarity and consistency in Liberty Utilities’ processes for determining whether a residential
14 customer qualifies for “Permanent” or “Non-permanent” rates creates an opportunity for harm to
15 Liberty Utilities’ residential customers. Liberty Utilities claims that the number of “Non-
16 Permanent” residential customers is increasing, but provides no data, documentation, or analysis
17 to support that claim⁸. Liberty Utilities has a built-in incentive to incorrectly categorize their
18 Residential customers as “Non-permanent” customers. Liberty Utilities’ proposed rate design
19 would charge “Non-Permanent” customers a significantly higher rate than “Permanent”
20 customers. The more residential customers designated “Non-permanent,” the greater Liberty
21 Utilities’ ability to earn their proposed revenue requirement.

⁸ This issue is being addressed in the testimony of James D. Wood; testimony being submitted contemporaneously with mine.

1 7. Tahoe ERG concludes that due to Liberty Utilities’ lack of proposed or existing
2 definitions for “Permanent” and “Non-permanent Residential Customers, the complete lack of
3 analysis, data or workpapers documenting how Liberty Utilities’ classified its Residential
4 Customers into “Permanent” and “Non-permanent” customers, the inexactness of Liberty
5 Utilities’ “Application for Residential Service” processes and policies, and that Liberty Utilities
6 has a built-in incentive to incorrectly categorize their Residential customers as “Non-permanent”
7 customers, Liberty Utilities’ rate design proposal is based upon significantly flawed assumptions
8 and should not be adopted.

9 Liberty Utilities should be required to submit to the CPUC a new Rate Design Proposal that
10 has sufficient definitions, documentation, data, legal and policy analysis to stand up under
11 scrutiny by the CPUC and parties. Liberty Utilities should be required to submit new, proposed
12 tariffs, for review and approval by the CPUC, that include detailed and specific definitions for
13 “Permanent” and “Non-permanent” residential service, detailed service application processes and
14 documents, including the “80% Determination practice,” and a detailed process by which
15 residential customers will be classified as “Permanent” or Non-Permanent” customers.

16 **Q.28. Does this conclude your written, prepared testimony?**

17 A.28.

18 Yes, it does, **but I reserve the right to supplement this testimony if relevant information**
19 **becomes available.**

20

21

22

23

ATTACHMENT 1

Liberty Utilities' Schedule No. D-1, Sheet No. 77, Item 2A.

SCHEDULE NO. D-1
DOMESTIC SERVICE

APPLICABILITY

This rate schedule is applicable to all domestic power service to separately metered single family dwellings and individual living units of multi-unit complexes, where such units are metered by the Utility.

TERRITORY

Entire California Service Area.

RATES

Customer Charge

Per meter, per month \$9.67 (I)

Energy Charges (Per kWh)

A. For Quantities up to and Including Baseline Quantities (See Special Condition 2):

| Distribution | Generation 1 | Vegetation 2 | SIP 4 | PPP 5 | BRBBA 7 | Total |
|---------------|---------------|--------------|-----------|---------------|---------------|---------------|
| \$0.08197 (I) | \$0.04329 (I) | \$0.00563 | \$0.00072 | \$0.00364 (R) | \$0.01178 (I) | \$0.14703 (I) |

B. For Quantities in Excess of Baseline Quantities (See Special Condition 2):

| | | | | | | |
|---------------|---------------|-----------|-----------|---------------|---------------|---------------|
| \$0.08197 (I) | \$0.06592 (I) | \$0.00563 | \$0.00072 | \$0.00364 (R) | \$0.01178 (I) | \$0.16966 (I) |
|---------------|---------------|-----------|-----------|---------------|---------------|---------------|

Other Energy Charges (Per kWh)

Surcharges⁸ \$0.00160

Late Charge

1% on any amount 45 days in arrears from previous billings

Minimum Charge

The per meter, per month Customer Charge

1. Generation – Charge includes the Energy Cost Adjustment Clause Billing Factor as described in the Preliminary Statement, Number 6.
2. Vegetation – Charge to recover amounts in the Vegetation Management Balancing Account, as described in the Preliminary Statement, Number 18.
3. CEMA – Charge to recover amounts in the Catastrophic Event Memorandum Account as approved in D16-12-024 and as described in the Preliminary Statement, Number 13.A.
4. SIP – Charge to recover the costs of the Solar Initiative Program as described in the Preliminary Statement, Number 21.
5. PPP – Charge to recover Public Purpose Programs funding energy efficiency and low income assistance programs described in Preliminary Statement, Numbers 10, 17 and 19.
6. GRCMA – Charge to recover amounts in the General Rate Case Memorandum Account as described in the Preliminary Statement, Number 13.I.
7. BRBBA – Charge to recover amounts in the Base Revenue Requirement Balancing Account as described in the Preliminary Statement Number 8.
8. Surcharges – Charge to recover the Public Utilities Commission Reimbursement Surcharge as described in Rate Schedule RF and the Energy Commission Surcharge that is established by the California Energy Commission.

(Continued)

Advice Letter No. 168-E Issued by Christopher A. Alario Date Filed March 31, 2021
 Decision No. D.20-08-030 Name President Effective April 1, 2021
 Title _____ Resolution No. _____

SCHEDULE NO. D-1
DOMESTIC SERVICE
 (Continued)

SPECIAL CONDITIONS

1. Service hereunder shall only be single-phase as described in Rule 2, Description of Service, and supplied to electric motors no larger than 10 horsepower.
2. Baseline Quantities. Each residential customer in a single-family dwelling consisting of a permanent residential unit is eligible for a baseline quantity of electricity which is necessary to supply a significant portion of the reasonable energy needs of the average residential customer. Residential Customer means a customer who is eligible for service on a domestic service rate schedule, and excludes general, commercial, industrial, and every other category of customer.
 - A. Eligibility. Baseline quantities are available only to separately metered, permanent Residential Customers. Non-permanent Customers such as recreational or vacation home customers are not eligible. The Utility may require Customers to complete and file with it an appropriate Declaration of Eligibility for baseline quantities. The Utility may also require proof of permanent residency, such as voter registration or property tax exemption. The penalty for presenting false information in this declaration shall be any legal action which the Utility might elect to pursue.
 - B. Different Baseline Quantities. Different baseline quantities are established for a) basic use, and b) all-electric only or electric space heat or both, as follows:

kWh Per Day Quantity¹

| <u>Season</u> | <u>Basic Use (E02, E06)</u> | <u>All-Electric Use (E04, E08)</u> |
|---------------------|-----------------------------|------------------------------------|
| Summer ² | 14.5 (I) | 16.4 (R) |
| Winter ³ | 19.0 (I) | 31.4 (R) |

1. Per day baseline quantities for each monthly billing cycle shall be equal to the daily baseline quantities (including Medical Baseline Quantities as appropriate) multiplied by the number of days in the billing cycle.
2. Summer baseline quantities will be used for six consecutive billing periods beginning on or after May 1.
3. Winter baseline quantities will be used for six consecutive billing periods beginning on or after November 1.

(Continued)

Advice Letter No. 72-E Issued by Gregory S. Sorensen Date Filed December 28, 2016

Decision No. _____ Name President Effective January 1, 2017
 Title _____ Resolution No. _____

(T)

SCHEDULE NO. D-1
DOMESTIC SERVICE
(Continued)

SPECIAL CONDITIONS (Continued)

- 3. Notice of Change. It is the responsibility of the customer to advise the Utility within fifteen (15) days of any changes in the type of space heaters in the residence and of changes in residential status.
- 4. Consumption for separately metered water heating service shall be billed in combination with other domestic consumption under the rates set forth in this schedule, except that an additional customer charge shall not be made.
- 5. Service hereunder shall not be provided to multiple dwellings or multiple units of multi-unit complexes, which are service through a common meter, or for domestic water pumping where water is delivered to more than one living unit.
- 6. Billing.
 - A. Bundled Service Customers receive supply and delivery services solely from the Utility. The customer's bill is based on the Total Energy Rate set forth above. The energy supply component is determined by multiplying the offset rate for Schedule D-1 during the last month by the customer's total usage.
 - B. Direct Access Customers purchase energy from an energy service provider and continue receiving delivery services from Liberty. The energy supply component is determined as specified for a Bundled Service Customer. The bill will be calculated as for a Bundled Service Customer, but the customer will receive a credit for the energy supply component. If the energy supply component is greater than the amount of the Bundled Service bill, the minimum bill for a Direct Access Customer is zero.

Advice Letter No. 28-E

Issued by

Michael R. Smart

Date Filed July 15, 2013

(T)

Name

Decision No. _____

President

Effective July 15, 2013

Title

Resolution No. _____

ATTACHMENT 2

Sierra Pacific's Schedule No. D-1, Item 2A.

SCHEDULE NO. D-1
DOMESTIC SERVICE

APPLICABILITY

This rate schedule is applicable to all domestic power service to separately metered single family dwellings and individual living units of multi-unit complexes, where such units are metered by the Utility.

TERRITORY

Entire California Service Area.

RATES

Customer Charge

Per meter, per month \$6.55

Energy Charges

For Quantities up to and Including Baseline Quantities (See Special Condition 2)

| Per kWh, | <u>Trans</u> ¹ | <u>Distrbtn</u> ² | <u>PPPC</u> ³ | <u>PUCRF</u> ⁴ | <u>Gen</u> ⁵ | <u>ECS</u> ⁶ | Total Energy Rate ⁷ | |
|-----------|---------------------------|------------------------------|--------------------------|---------------------------|-------------------------|-------------------------|--------------------------------------|-----|
| per month | \$0.00664 | \$0.03894 | \$0.00215 | \$0.00024 | \$0.05745 | \$0.00022 | \$0.10564 | (R) |

For Quantities in Excess of Baseline Quantities (See Special Condition 2):

| | | | | | | | | |
|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----|
| Per kWh | | | | | | | | |
| per month | \$0.00664 | \$0.03894 | \$0.00215 | \$0.00024 | \$0.08577 | \$0.00022 | \$0.13396 | (R) |

1. Trans – Transmission Charges.
2. Distrbtn – Distribution Charges. Includes \$(0.00222) per kWh for Trust Transfer Amount.
3. PPPC – Public Purpose Programs Charge to fund energy efficiency activities, and low income assistance programs.
4. PUCRF – Public Utilities Commission Reimbursement Surcharge that is described in Schedule No. RF.
5. Gen – Generation Charges which are applicable only to bundled service customers. Includes an Energy Cost Adjustment Clause billing factor that is described in Part 6 of the Preliminary Statement.
6. ECS – Energy Commission Surcharge that is established by the California Energy Commission.
7. Total Energy Rate – Sum of transmission charges, distribution charges, public purpose programs charges, PUC reimbursement surcharges, generation charges and Energy Commission Surcharges.

Late Charge

1% on any amount 45 days in arrears from previous billings

Minimum Charge

The per meter, per month Customer Charge

(Continued)

(To be inserted by utility)
 Advice Letter No. 356-E

Issued by
Michael J. Carano
 Name
Director
 Title

(To be inserted by CPUC)
 Date Filed 12-11-09

Decision No. _____

Effective 01-01-10

Resolution No. _____

SCHEDULE NO. D-1
DOMESTIC SERVICE
 (Continued)

SPECIAL CONDITIONS

1. Service hereunder shall only be single-phase as described in Rule 2, Description of Service, and supplied to electric motors no larger than 10 horsepower.
2. Baseline Quantities. Each residential customer in a single-family dwelling consisting of a permanent residential unit is eligible for a baseline quantity of electricity which is necessary to supply a significant portion of the reasonable energy needs of the average residential customer. Residential Customer means a customer who is eligible for service on a domestic service rate schedule, and excludes general, commercial, industrial, and every other category of customer.
 - A. Eligibility. Baseline quantities are available only to separately metered, permanent Residential Customers. Non-permanent Customers such as recreational or vacation home customers are not eligible. The Utility may require Customers to complete and file with it an appropriate Declaration of Eligibility for baseline quantities. The Utility may also require proof of permanent residency, such as voter registration or property tax exemption. The penalty for presenting false information in this declaration shall be any legal action which the Utility might elect to pursue.
 - B. Different Baseline Quantities. Different baseline quantities are established for a) basic use, and b) all-electric only or electric space heat or both, as follows:

| | <u>kWh Per Day Quantity¹</u> | | |
|---------------------|---|------------------------------------|--------|
| <u>Season</u> | <u>Basic Use (E02, E06)</u> | <u>All-Electric Use (E04, E08)</u> | |
| Summer ² | 12.9 | 15.6 | (I) |
| Winter ³ | 17.7 | 30.7 | (I, R) |

1. Per day baseline quantities for each monthly billing cycle shall be equal to the daily baseline quantities (including Medical Baseline Quantities as appropriate) multiplied by the number of days in the billing cycle.
2. Summer baseline quantities will be used for six consecutive billing periods beginning on or after May 1.
3. Winter baseline quantities will be used for six consecutive billing periods beginning on or after November 1.

(Continued)

(To be inserted by utility)
 Advice Letter No. 349-E

Issued by
Michael J. Carano
 Name
Director
 Title

(To be inserted by CPUC)
 Date Filed 11-06-09

Decision No. _____

Effective 12-01-09

Resolution No. _____

SCHEDULE NO. D-1
DOMESTIC SERVICE
(Continued)

SPECIAL CONDITIONS (Continued)

2. Baseline Quantities. (Continued)

C. Standard Limited Quantity. A standard limited Medical Baseline Quantity in addition to those quantities listed in B. above of 16.5 kWh per day is available for Residential Customers who demonstrate that one of the following conditions exist: a) regular use in the Customer's residence of one or more medical life-support devices that is essential to maintain the life of a full-time resident of the household, or b) there is a full-time resident of the household who is a paraplegic, hemiplegic, quadriplegic, multiple sclerosis, or scleroderma patient.

- (1) A supplemental quantity of 16.5 kWh per day will be provided to multiple sclerosis patients for air conditioning during the six summer months of May 1 through October 31. Customer applications for this quantity must be accompanied by a licensed doctor's certification.
- (2) Additional baseline quantities are available to Residential Customers who qualify for baseline usage, who require the use of a life support device (e.g., kidney dialysis machine or iron lung). Upon certification of need by the Customer, the Utility will estimate daily kWh for the life support device for inclusion in the total allowable baseline quantity.
- (3) Life support devices means those devices which utilize mechanical or artificial means to sustain, restore, or supplant a vital function, or mechanical equipment which is relied upon for mobility both within and outside building. Life support devices or equipment include those listed in PUC Section 739.2

D. Limitation. Space heating quantities shall be available only where a minimum of 80% of available living area is heated by permanently installed electric space heating equipment. Partial quantities will not be offered.

(N)

(N)

(Continued)

(To be inserted by utility)
Advice Letter No. 315-E

Issued by
Michael J. Carano
Name
Director
Title

(To be inserted by CPUC)
Date Filed 08-30-06

Decision No. _____

Effective 09-01-06

Resolution No. _____

SCHEDULE NO. D-1
DOMESTIC SERVICE
(Continued)

SPECIAL CONDITIONS (Continued)

- 3. Notice of Change. It is the responsibility of the customer to advise the Utility within fifteen (15) days of any changes in the type of space heaters in the residence and of changes in residential status.
- 4. Consumption for separately metered water heating service shall be billed in combination with other domestic consumption under the rates set forth in this schedule, except that an additional customer charge shall not be made.
- 5. Service hereunder shall not be provided to multiple dwellings or multiple units of multi-unit complexes, which are service through a common meter, or for domestic water pumping where water is delivered to more than one living unit.
- 6. Billing.
 - A. Bundled Service Customers receive supply and delivery services solely from the Utility. The customer's bill is based on the Total Energy Rate set forth above. The energy supply component is determined by multiplying the offset rate for Schedule D-1 during the last month by the customer's total usage.
 - B. Direct Access Customers purchase energy from an energy service provider and continue receiving delivery services from Sierra. The energy supply component is determined as specified for a Bundled Service Customer. The bill will be calculated as for a Bundled Service Customer, but the customer will receive a credit for the energy supply component. If the energy supply component is greater than the amount of the Bundled Service bill, the minimum bill for a Direct Access Customer is zero.

(D)
|
(D)

(To be inserted by utility)
Advice Letter No. 347-E

Issued by
Michael J. Carano

(To be inserted by CPUC)
Date Filed 03-03-09

Decision No. _____

Name
Director
Title

Effective 04-01-09

Resolution No. _____

ATTACHMENT 3

Liberty Utilities' "Declaration of Eligibility for Permanent Residential Baseline Rates"



DECLARATION OF ELIGIBILITY FOR PERMANENT RESIDENTIAL BASELINE RATES

_____, applicant, hereby declares under oath that the quantities of electric energy which are being requested are for use at a permanent, full time, primary residence of the applicant. The applicant also declares that this residence is not a recreation, vacation, or second home.

WARNING: It is unlawful for an individual to receive a Permanent Residential Baseline Allowance for more than one residence in the State of California. In the event Liberty Utilities (CalPeco Electric) LLC ("Liberty") discovers that a customer is receiving more than one allowance, (either from Liberty or another electric utility), the company is required by its rules and regulations to prosecute said customer to the full extent of the law.

Signature

Subscribed and sworn to before me this

_____ Day of _____, 20_____

Notary Public

Account Number _____

Service Address _____

Mailing Address _____

APPLIANCE INVENTORY – Please check which type of appliance your home is equipped with:

Water Heating – Electric _____, Gas _____, Other _____

Space Heating – Electric _____, Gas _____, Other _____

Phone: 800-782-2506
Fax: 530-544-4811
933 Eloise Ave, South Lake Tahoe, CA 96150

ATTACHMENT 4

Liberty Utilities' "CSR Frontline - Service Request" Form



CSR Frontline – Service Request

Greeting

Good Morning / Good Afternoon

Thank you for calling Liberty my name is _____ how may I assist you?

Customer states they would like to establish service(s) in their name.

Are you PURCHASING or RENTING?

Have you ever had service with us before?

NO – since you never had service with us before a deposit will be required.

There are ways that a deposit can be waived;

Allow me to run a credit check via Equifax. I will run your name and social security number. The system will tell me whether a deposit will be required or not.

Provide a Letter of Credit from a current or previous utility that states you had 12 months of service within the past 2 years with excellent payment history.

Establish EFT (Bank Draft) – An application will be sent to you. Return the application with a voided check – upon receipt the deposit will be removed from the account.

YES - May I have your Last Name, First Name, Middle initial – Social Security Number

If the customer’s previous credit rating is unsatisfactory – A deposit will be required

SERVICE ADDRESS: _____

DATE to ESTABLISH SERVICE: _____

Transfer to SERVICE ADDRESS: _____

DATE to TRANSFER SERVICE: _____

LAST NAME: _____

FIRST NAME: _____ MIDDLE INITIAL: _____

SOCIAL SECURITY NUMBER: _____ PASSWORD: _____

DRIVER’S LICENSE NUMBER: _____ ISSUING STATE: _____



CSR Frontline – Service Request

NAME OF EMPLOYER: _____

MAILING ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____

PRIMARY PHONE NUMBER: _____

SECONDARY PHONE NUMBER/CELL: _____

EMAIL ADDRESS: _____

PRIMARY or NON PRIMARY RESIDENCE / IS THERE A DOG ON THE PREMISE? YES NO

IS THERE A GATE CODE? YES NO / IS THERE ANYONE IN THE HOUSEHOLD 62 OR OLDER? YES NO

IS THERE ANYONE IN THE HOUSEHOLD THAT REQUIRES MEDICAL EQUIPMENT? YES NO

A \$ 25.00 Service establishment fee will appear on your first bill; this is a onetime non-waivable charge. The deposit will also appear on your first bill.

SERVICE ORDER: TONN TOFF REON CILL

TRANSFER SERVICE ORDER: TONN TOFF REON CILL

CLOSING STATEMENT

IS THERE ANYTHING ELSE I MAY ASSIST YOU WITH TODAY?

THANK YOU FOR CALLING LIBERTY UTILITIES, HAVE A GREAT DAY!

ATTACHMENT 5

**Liberty Utilities' Letter to Residential Customer Requiring That Customer submit
“Declaration of Eligibility for Permanent Residential Baseline Rates” Due to Mailing
Address Outside of Service Area**



Date: 1/25/2022

MARIA ELIZARRARAZ
PO BOX 3369
INCLINE VILLAGE, NV 89450

Account Number: 88545986-88215866
Service Address: 501 NATIONAL AVE UNIT 48
TAHOE VISTA, CA 96148

Dear MARIA ELIZARRARAZ:

Enclosed is a Declaration of Eligibility form for Permanent Residential Baseline Rates.

Permanent Residential Baseline Rates are given to permanent, full-time residential customers at their primary place of residence. Primary Residential Baseline customers receive a daily kilowatt-hour allowance at a discounted rate, determined by the season and the type of electric service in the home.

Your current mailing address is located outside our service area; therefore we will be changing your rate from a permanent to a non-permanent baseline status.

If this is your primary residence and the status change is in error, please complete the enclosed form, have your signature **notarized** and return in the envelope provided. The primary baseline rate will be reinstated upon our receipt of the completed form.

If further information or assistance is required, please contact Customer Service at (800)782-2506.

Sincerely,

Liberty Customer Service

ATTACHMENT 6

**Liberty Utilities' Letter to Residential Customer Requiring That Customer submit
“Declaration of Eligibility for Permanent Residential Baseline Rates” Due to Receiving a
Mailing Address Change for the Account from the United States Postal Service**



Date: 1/25/2022

JUNE FINUCAN
1295 SUSIE LAKE RD
SOUTH LAKE TAHOE, CA 96150

Account Number: 88538717-88145480
Service Address: 1295 SUSIE LAKE RD
SOUTH LAKE TAHOE, CA 961508331

Dear JUNE FINUCAN:

Enclosed is a Declaration of Eligibility form for Permanent Residential Baseline Rates.

Permanent Residential Baseline Rates are given to full-time residential customers at their primary place of residence. Primary Residential Baseline customers receive a daily kilowatt-hour allowance at a discounted rate, determined by the season and the type of electric service in the home.

We are in receipt of a mailing address change for your account from the United States Postal Service. Your new mailing address is located outside our service area; therefore we will be changing your rate from a permanent to a non-permanent baseline status.

If this is your primary residence and the status change is in error, please complete the enclosed form, have your signature **notarized** and return in the envelope provided. The primary baseline rate will be reinstated upon our receipt of the completed form.

If further information or assistance is required, please contact Customer Service at (800)782-2506.

Sincerely,

Liberty Customer Service

ATTACHMENT 7

Additional Liberty Utilities' Customer Service Process Documents

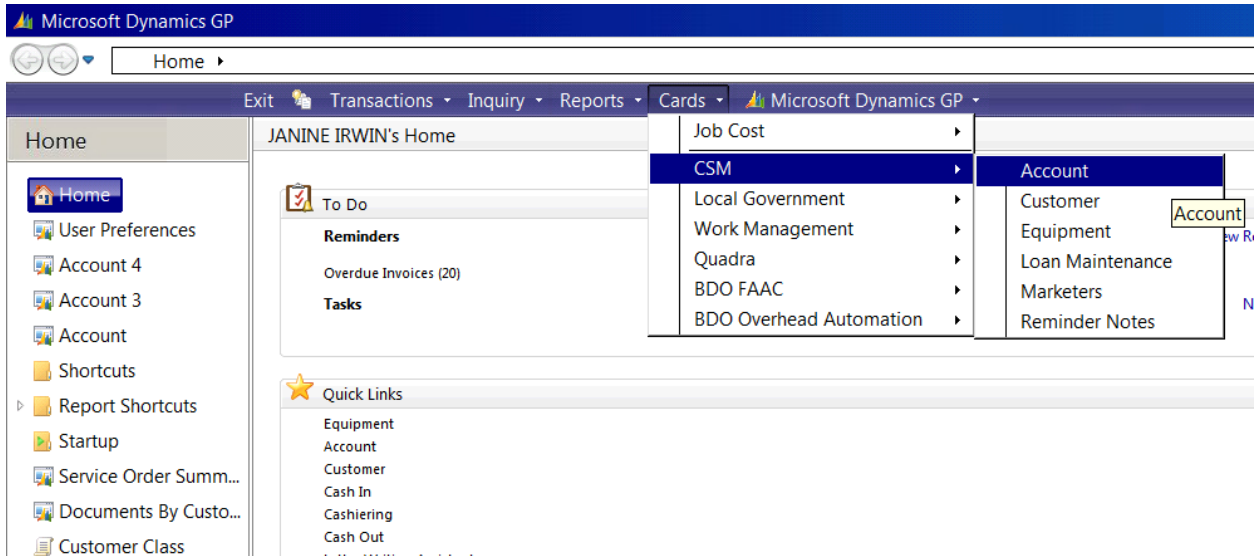
Title / Name: Mailing Address Change – One Location


| | | | |
|-------------------------------|------------------------------|----------------------------------|---------------------------|
| GP System #: Sub-Category: | 8800 900 Work Instruction | Discipline: Sequential Doc. # | 700 Customer Care 0761 |
| State: | California | Commodity: | Electric |

Purpose: To provide the Customer Service Representative step by step instructions of how to change a customer’s current mailing address.

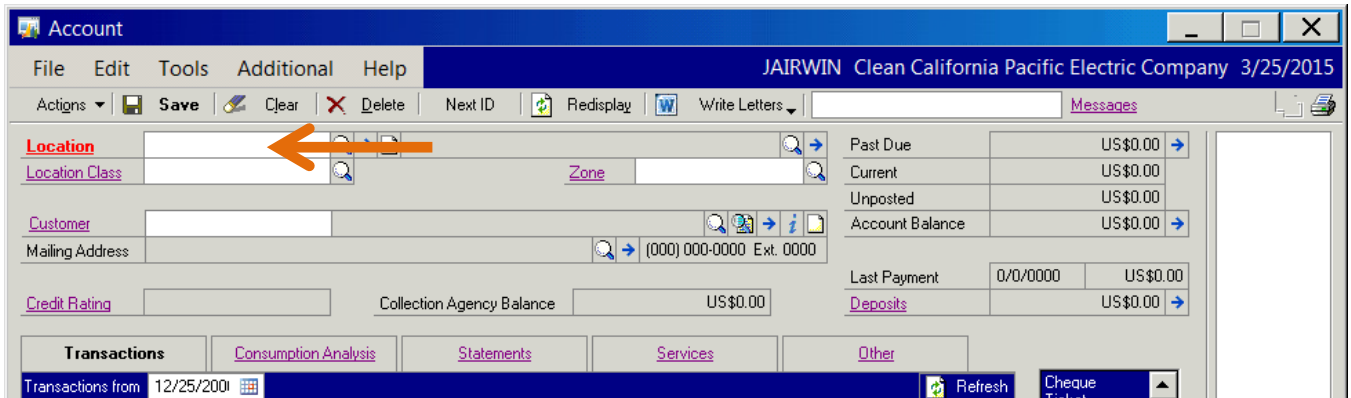
Pre-Requisite: Customer must have an existing customer record.

1. Prior to changing the customers mailing address it is important to know if the new mailing address will have an effect on the customer’s rate. Primary / Non Primary
2. From Microsoft Dynamics GP use the following path: Cards > CSM > Account

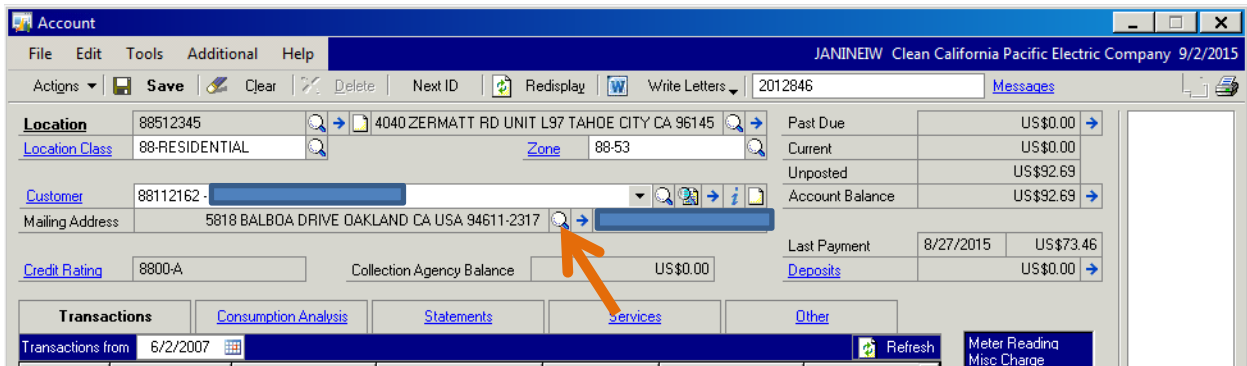


3. Enter the Location Number. Press Tab to update the screen. **NOTE:** If you do not know the Location Number, use the Search  button

| | | | | | | |
|-------------------------|---|---|----------------|------------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 9/2/2015 | | |
| Approved by Name/Title: | Michele Piechocinski; Foreman Customer Care Frontline | | Date Approved: | 9/8/2015 | | |
| Revision History: | Rev # 1 | Description: Modified step #15 | Date Revised: | 11/14/2016 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: Modified Steps 13 through 17.f | Date Revised: | 1/10/2018 | Approved by: (Name/Title) | Janine Irwin-Webb, Sr. Specialist Customer Service |

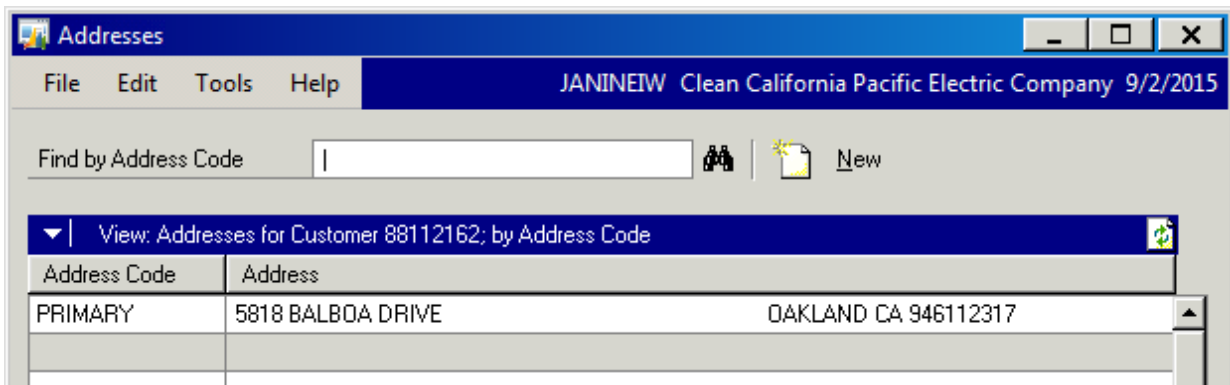


4. Account card appears



5. Validate customer of record is correct

6. View current mailing address information - Click on mailing address look up icon

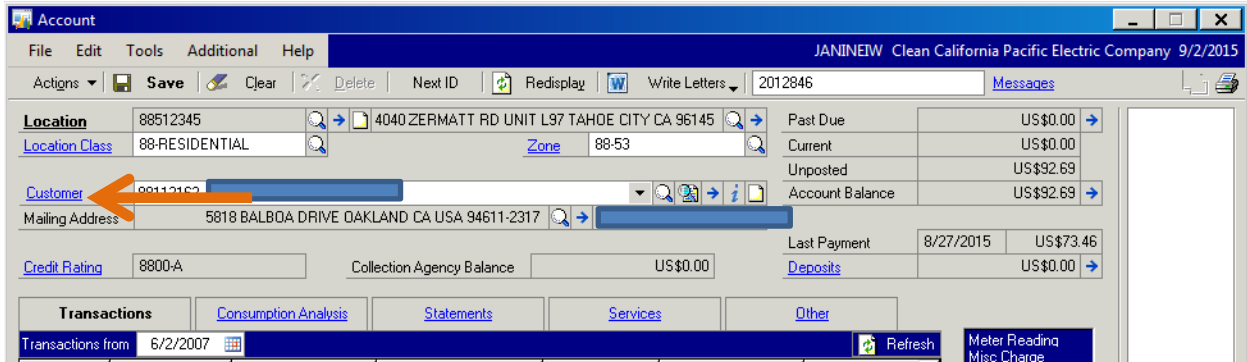


7. Addresses screen appears

8. This table shows ALL mailing addresses that are tied to this Customer number

| | | | | | | |
|-------------------------|---|---|----------------|------------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 9/2/2015 | | |
| Approved by Name/Title: | Michele Piechocinski; Foreman Customer Care Frontline | | Date Approved: | 9/8/2015 | | |
| Revision History: | Rev # 1 | Description: Modified step #15 | Date Revised: | 11/14/2016 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: Modified Steps 13 through 17.f | Date Revised: | 1/10/2018 | Approved by: (Name/Title) | Janine Irwin-Webb, Sr. Specialist Customer Service |

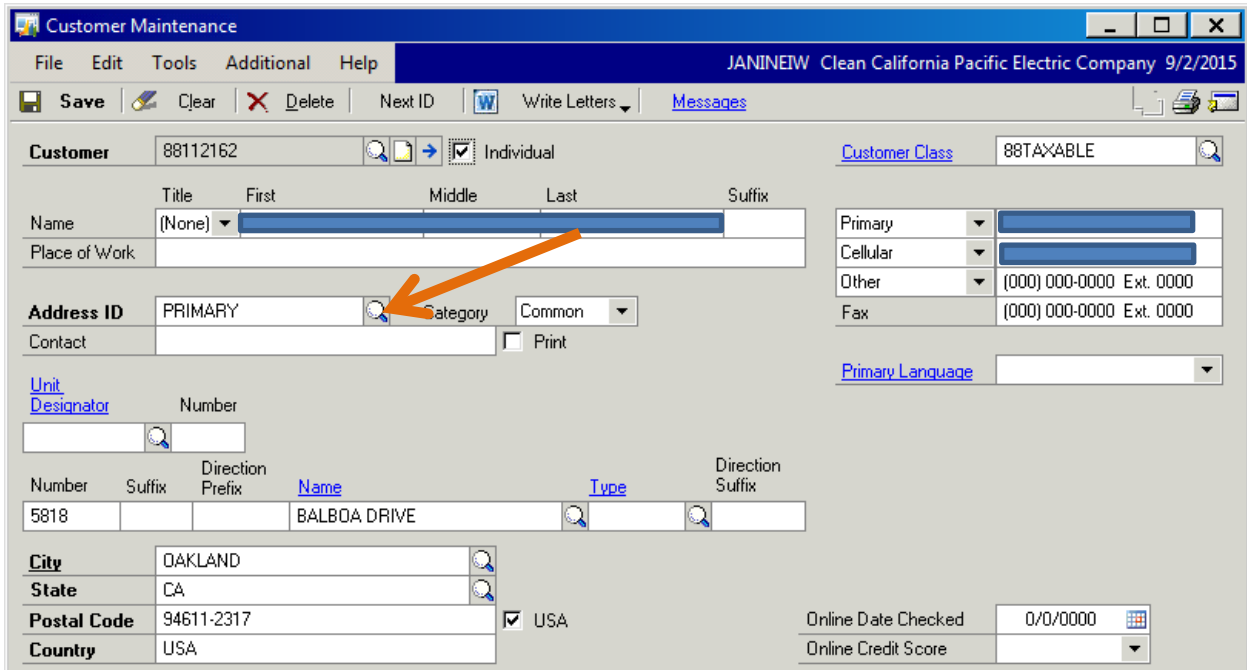
9. Close (X) out of screen



10. Account card appears

11. Click on Customer link

12. Customer Maintenance screen appears

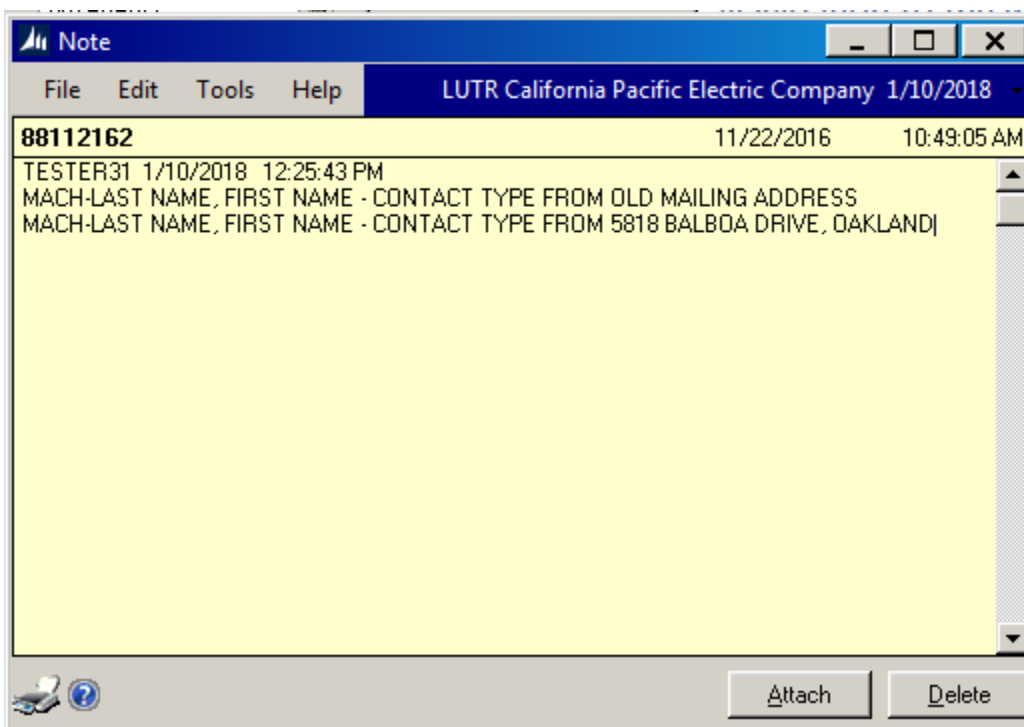


13. Prior to updating mailing address – create customer note

14. Click on Customer Note Pad

15. Enter appropriate note: i.e. MACH – LAST NAME, FIRST NAME – CONTACT TYPE – FROM (old mailing address)

| | | | | | | |
|-------------------------|---|---|----------------|------------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 9/2/2015 | | |
| Approved by Name/Title: | Michele Piechocinski; Foreman Customer Care Frontline | | Date Approved: | 9/8/2015 | | |
| Revision History: | Rev # 1 | Description: Modified step #15 | Date Revised: | 11/14/2016 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: Modified Steps 13 through 17.f | Date Revised: | 1/10/2018 | Approved by: (Name/Title) | Janine Irwin-Webb, Sr. Specialist Customer Service |



16. Click Attach

17. Modify current mailing address per customer request.

NOTE: “Primary” must always be the “Address ID” type.

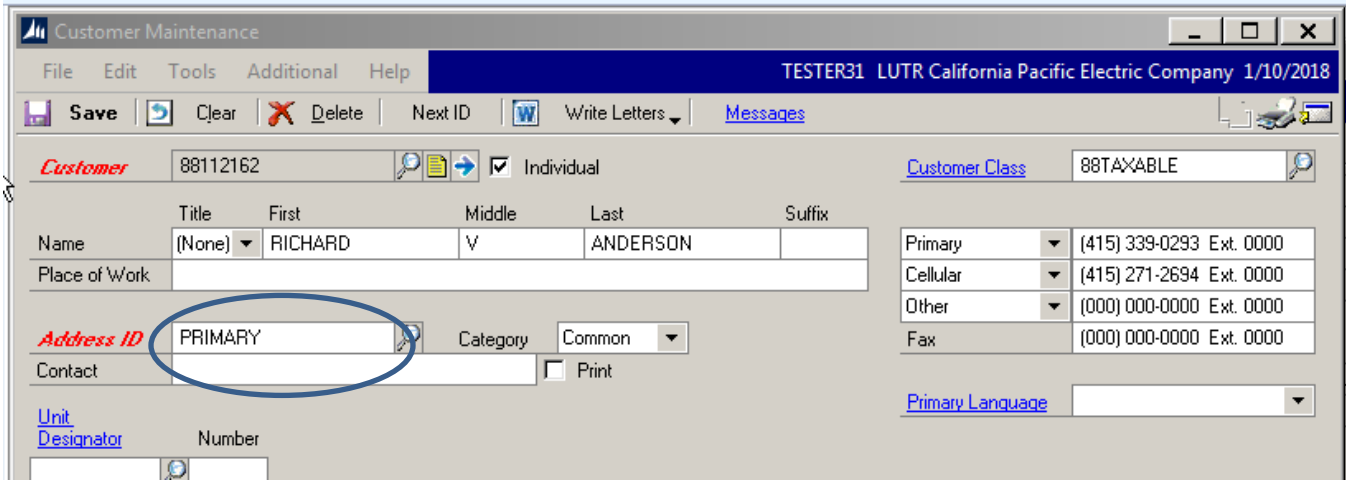
- i. Is current mailing address M1? STOP! – Review account does this customer have multiple locations in their name?
- ii. Does “Primary” address exist in addressing table?

Yes – Select “Primary” – do not change your customer note.
Change “Primary” to M1 or next sequential number, i.e. M2 etc.

No – Select “Primary” from Address ID field in next step (“a”).

- a. If current mailing address is “Primary” change address ID from “Primary” to “M1”
If M1 has been used – move to next sequential number; i.e M2.

| | | | | | | |
|-------------------------|---|---|----------------|------------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 9/2/2015 | | |
| Approved by Name/Title: | Michele Piechocinski; Foreman Customer Care Frontline | | Date Approved: | 9/8/2015 | | |
| Revision History: | Rev # 1 | Description: Modified step #15 | Date Revised: | 11/14/2016 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: Modified Steps 13 through 17.f | Date Revised: | 1/10/2018 | Approved by: (Name/Title) | Janine Irwin-Webb, Sr. Specialist Customer Service |



Customer Maintenance - TESTER31 LUTR California Pacific Electric Company 1/10/2018

Customer: 88112162 Individual

Name: (None) RICHARD V ANDERSON

Address ID: PRIMARY (circled)

Category: Common

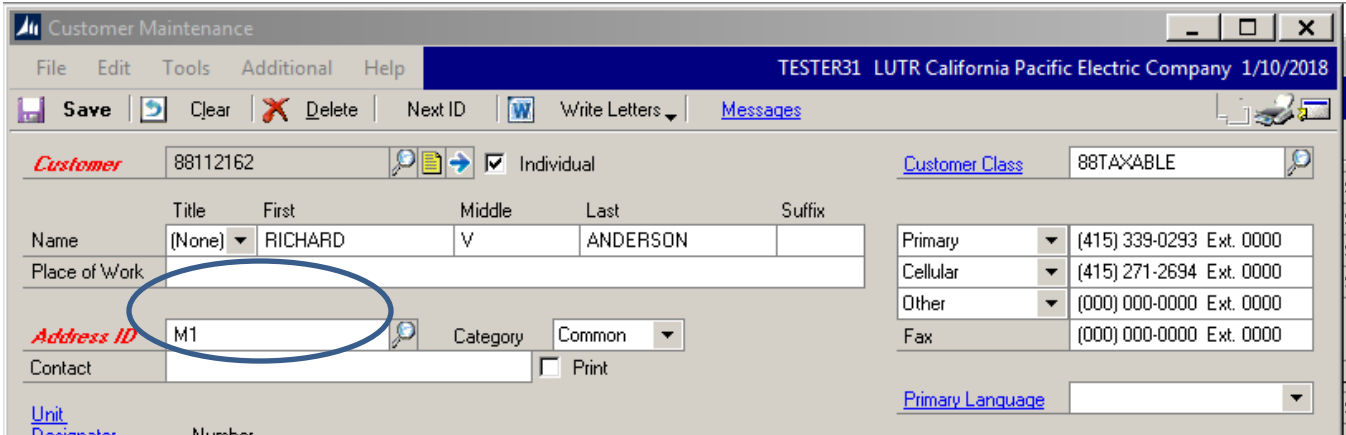
Customer Class: 88TAXABLE

Primary: (415) 339-0293 Ext. 0000

Cellular: (415) 271-2694 Ext. 0000

Other: (000) 000-0000 Ext. 0000

Fax: (000) 000-0000 Ext. 0000



Customer Maintenance - TESTER31 LUTR California Pacific Electric Company 1/10/2018

Customer: 88112162 Individual

Name: (None) RICHARD V ANDERSON

Address ID: M1 (circled)

Category: Common

Customer Class: 88TAXABLE

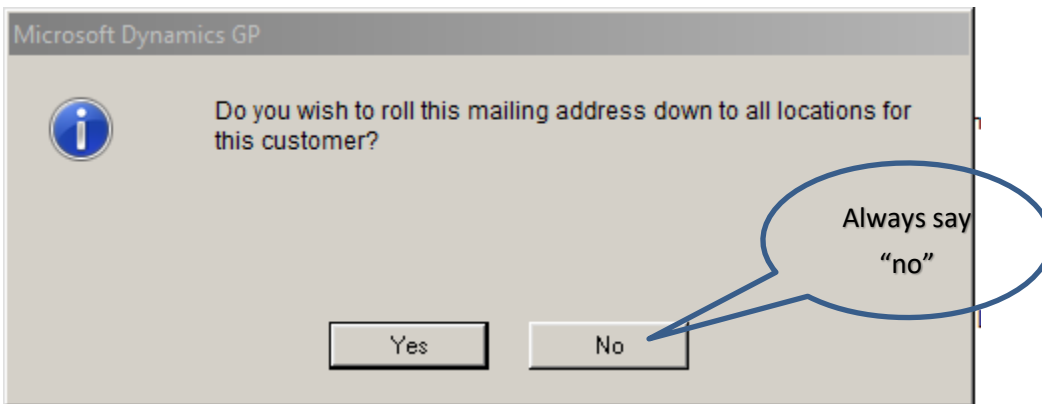
Primary: (415) 339-0293 Ext. 0000

Cellular: (415) 271-2694 Ext. 0000

Other: (000) 000-0000 Ext. 0000

Fax: (000) 000-0000 Ext. 0000

- i. Click SAVE
- ii. Pop Up message appears



Microsoft Dynamics GP

Do you wish to roll this mailing address down to all locations for this customer?

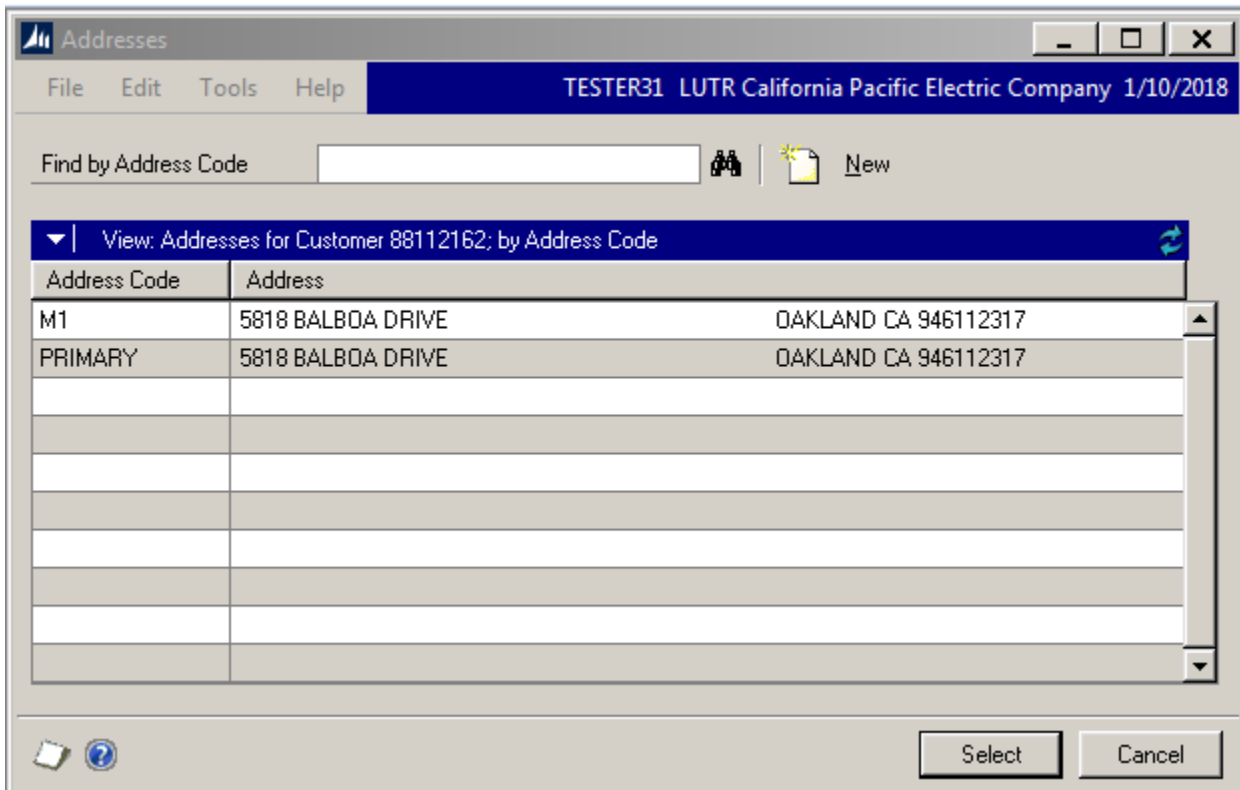
Yes No (circled)

Always say "no" (circled)

- iii. Click No

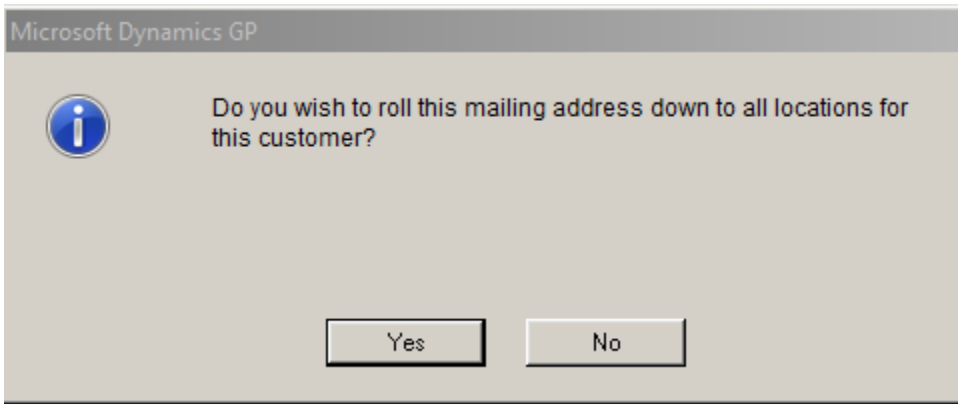
| | | | | | | |
|-------------------------|---|---|----------------|------------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 9/2/2015 | | |
| Approved by Name/Title: | Michele Piechocinski; Foreman Customer Care Frontline | | Date Approved: | 9/8/2015 | | |
| Revision History: | Rev # 1 | Description: Modified step #15 | Date Revised: | 11/14/2016 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: Modified Steps 13 through 17.f | Date Revised: | 1/10/2018 | Approved by: (Name/Title) | Janine Irwin-Webb, Sr. Specialist Customer Service |

- iv. Click SAVE
- v. Customer Maintenance screen becomes blank
- vi. Close (X) out of screen
- vii. Account card reappears
- viii. Click on Customer Link
- ix. Customer Maintenance screen appears
- x. Click on Address ID look up icon



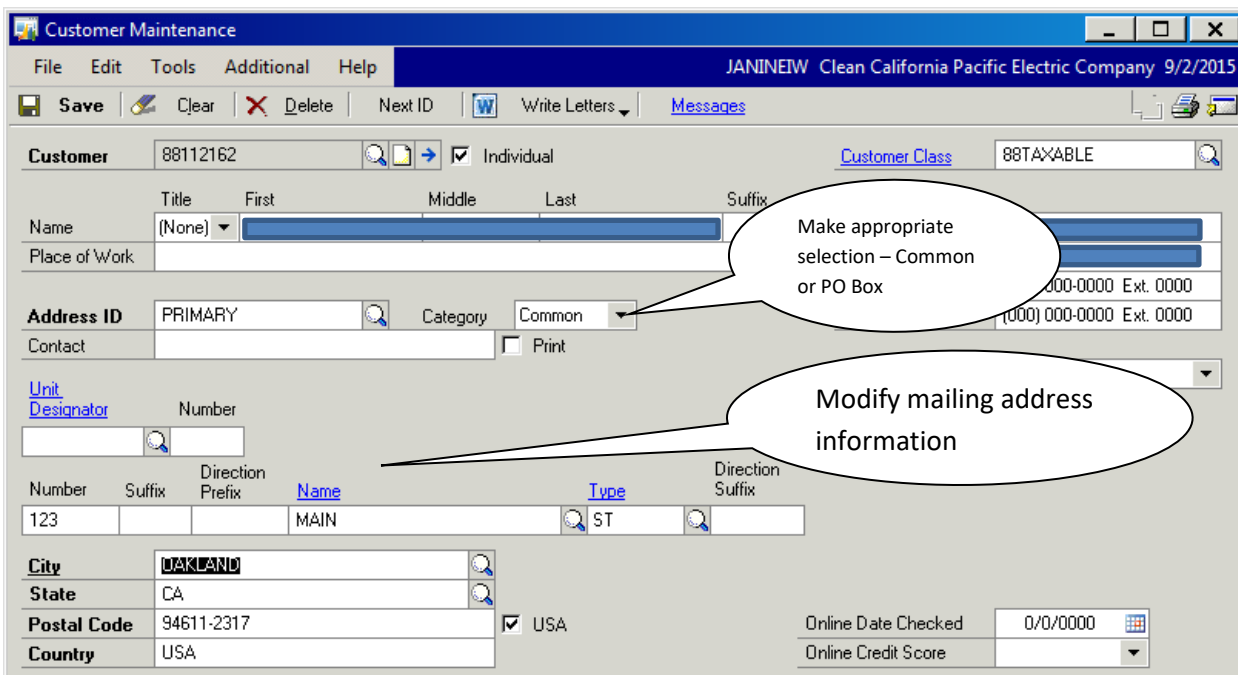
- xi. Review information; there should be an “M” and “Primary” address with the same information.
- xii. Highlight “Primary” – click “Select”
- xiii. Pop Up message appears

| | | | | | | |
|-------------------------|---|---|----------------|------------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 9/2/2015 | | |
| Approved by Name/Title: | Michele Piechocinski; Foreman Customer Care Frontline | | Date Approved: | 9/8/2015 | | |
| Revision History: | Rev # 1 | Description: Modified step #15 | Date Revised: | 11/14/2016 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: Modified Steps 13 through 17.f | Date Revised: | 1/10/2018 | Approved by: (Name/Title) | Janine Irwin-Webb, Sr. Specialist Customer Service |



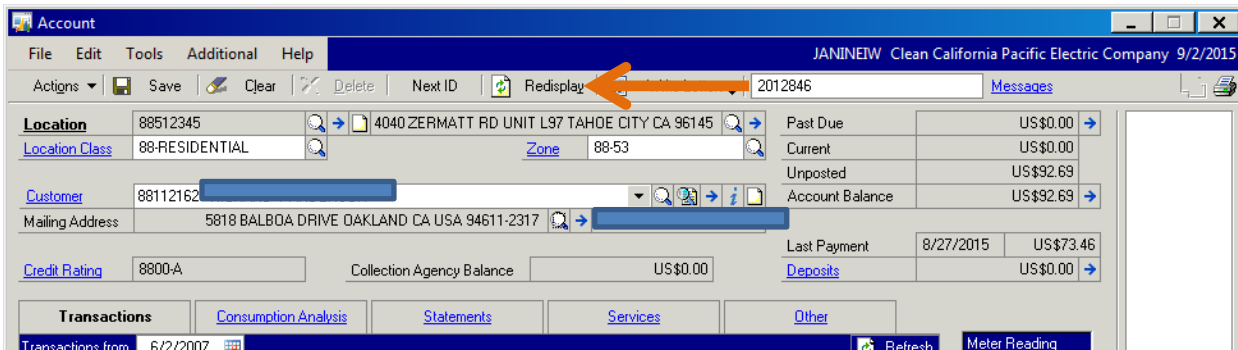
xiv. Click “No”

xv. Enter new mailing address information – type over old information if the category type remains the same. If not input new type and new information

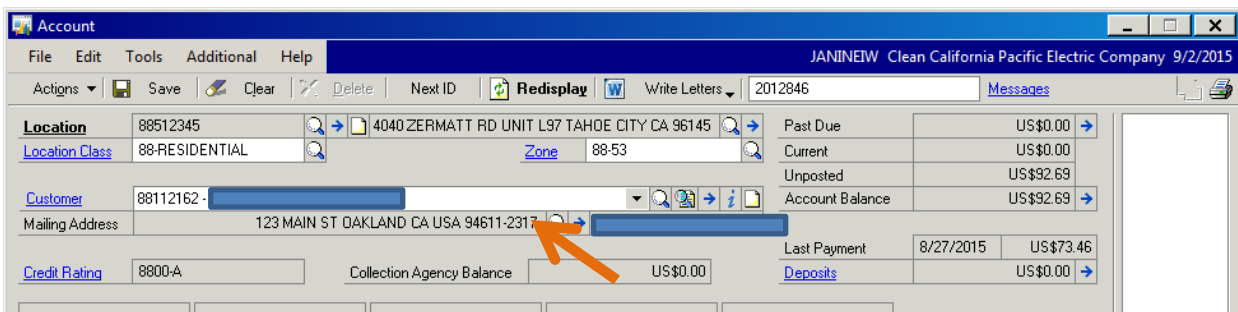


- b. Click SAVE
- c. Close out (X) of screen
- d. Account card appears

| | | | | | | |
|-------------------------|---|---|----------------|------------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 9/2/2015 | | |
| Approved by Name/Title: | Michele Piechocinski; Foreman Customer Care Frontline | | Date Approved: | 9/8/2015 | | |
| Revision History: | Rev # 1 | Description: Modified step #15 | Date Revised: | 11/14/2016 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: Modified Steps 13 through 17.f | Date Revised: | 1/10/2018 | Approved by: (Name/Title) | Janine Irwin-Webb, Sr. Specialist Customer Service |



e. Click redisplay



f. Mailing address information updates with new mailing address

NOTE: If this mailing address has an effect on the customer's billing rate that requires Declaration of Eligibility for Permanent Residential Baseline Rates refer to Rate Change work instruction.

Results: You have successfully zoned a customer's mailing address for one (1) location.

| | | | | | | |
|-------------------------|---|---|----------------|------------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 9/2/2015 | | |
| Approved by Name/Title: | Michele Piechocinski; Foreman Customer Care Frontline | | Date Approved: | 9/8/2015 | | |
| Revision History: | Rev # 1 | Description: Modified step #15 | Date Revised: | 11/14/2016 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: Modified Steps 13 through 17.f | Date Revised: | 1/10/2018 | Approved by: (Name/Title) | Janine Irwin-Webb, Sr. Specialist Customer Service |

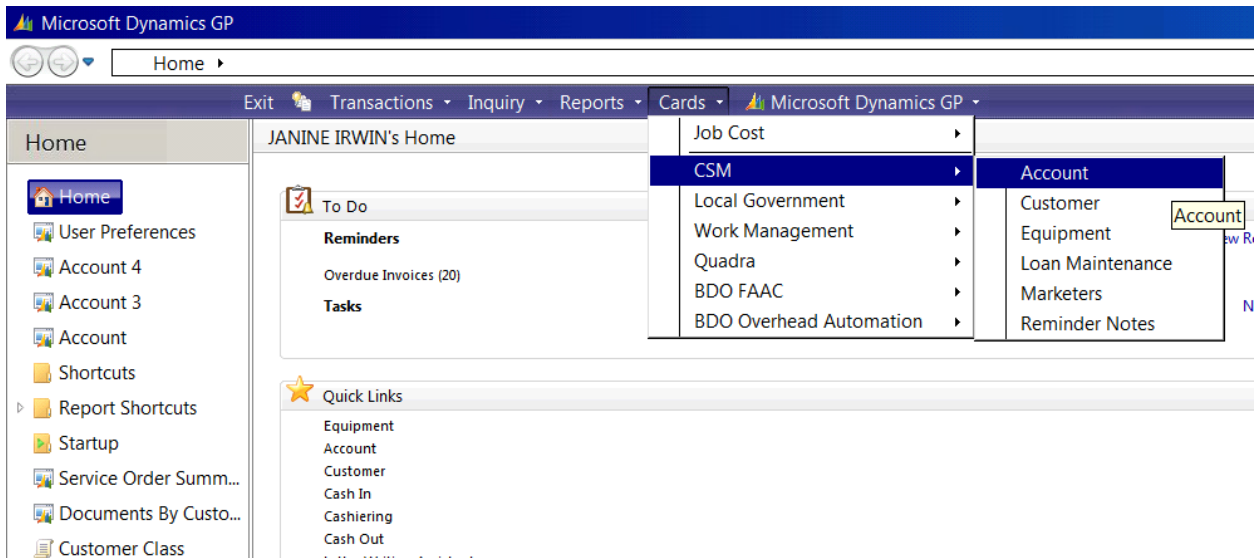
Title / Name: Mailing Address Change – One Location


| | | | |
|-------------------------------|------------------------------|----------------------------------|---------------------------|
| GP System #: Sub-Category: | 8800 900 Work Instruction | Discipline: Sequential Doc. # | 700 Customer Care 0761 |
| State: | California | Commodity: | Electric |

Purpose: To provide the Customer Service Representative step by step instructions of how to change a customer’s current mailing address.

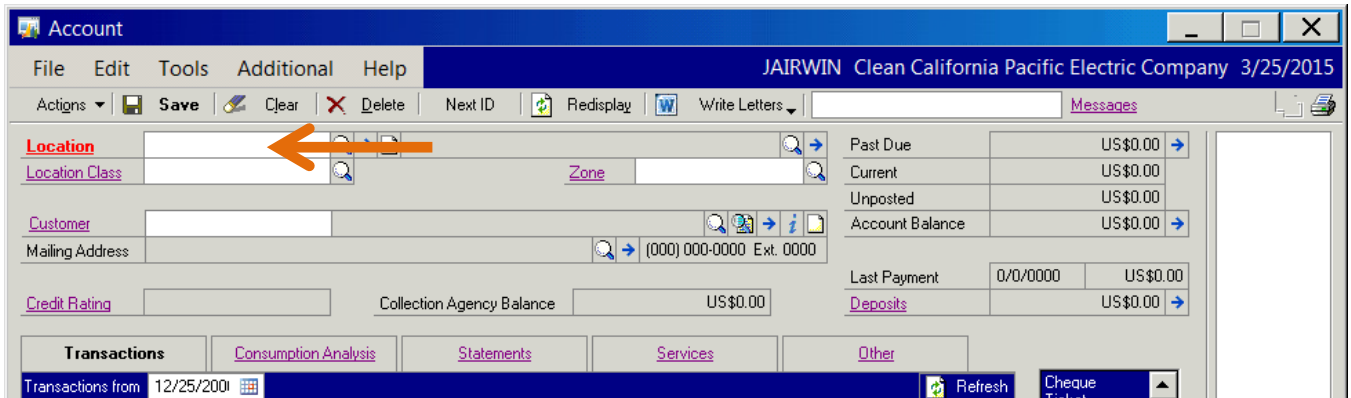
Pre-Requisite: Customer must have an existing customer record.

1. Prior to changing the customers mailing address it is important to know if the new mailing address will have an effect on the customer’s rate. Primary / Non Primary
2. From Microsoft Dynamics GP use the following path: Cards > CSM > Account

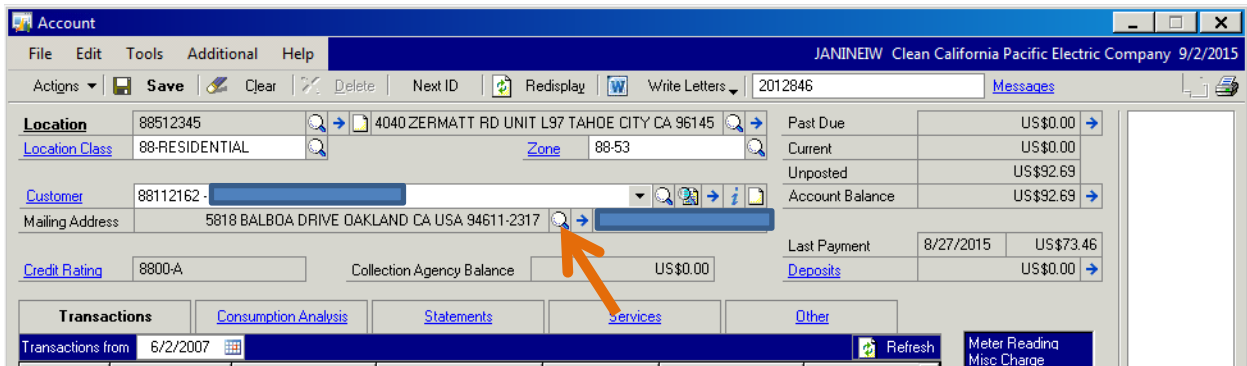


3. Enter the Location Number. Press Tab to update the screen. **NOTE:** If you do not know the Location Number, use the Search  button

| | | | | | | |
|-------------------------|---|---|----------------|------------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 9/2/2015 | | |
| Approved by Name/Title: | Michele Piechocinski; Foreman Customer Care Frontline | | Date Approved: | 9/8/2015 | | |
| Revision History: | Rev # 1 | Description: Modified step #15 | Date Revised: | 11/14/2016 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: Modified Steps 13 through 17.f | Date Revised: | 1/10/2018 | Approved by: (Name/Title) | Janine Irwin-Webb, Sr. Specialist Customer Service |

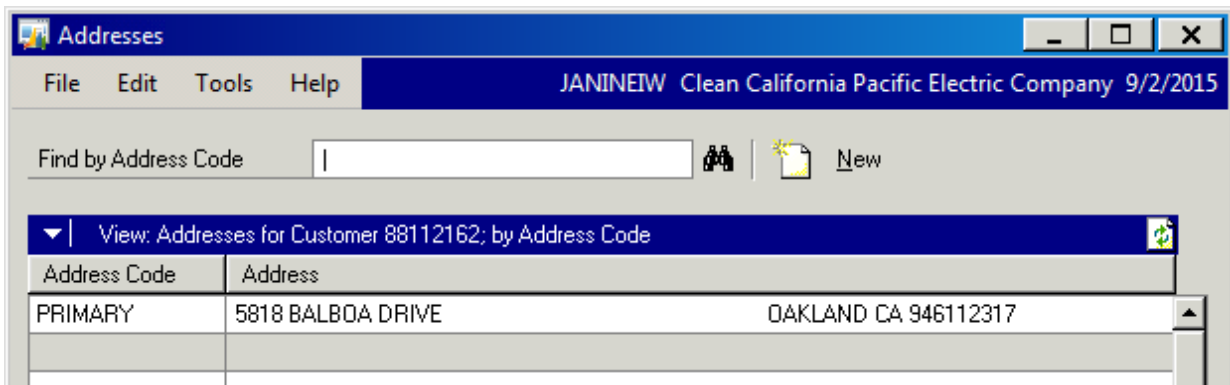


4. Account card appears



5. Validate customer of record is correct

6. View current mailing address information - Click on mailing address look up icon

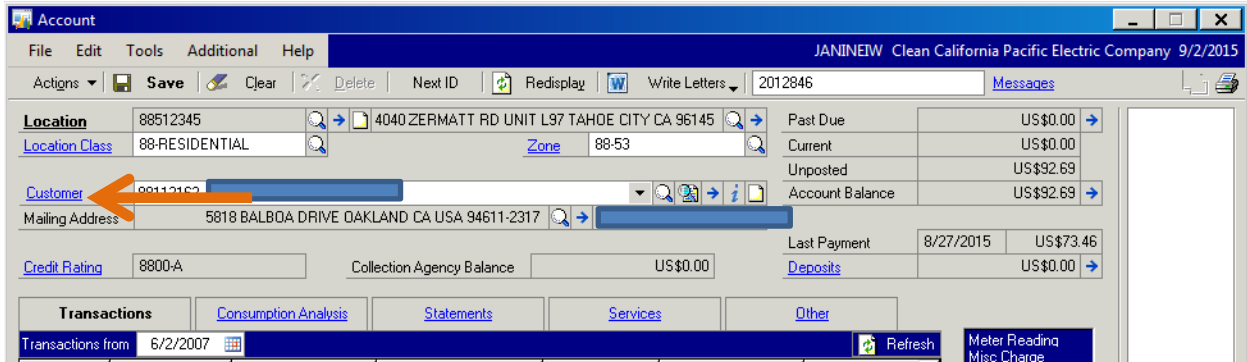


7. Addresses screen appears

8. This table shows ALL mailing addresses that are tied to this Customer number

| | | | | | | |
|-------------------------|---|---|----------------|------------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 9/2/2015 | | |
| Approved by Name/Title: | Michele Piechocinski; Foreman Customer Care Frontline | | Date Approved: | 9/8/2015 | | |
| Revision History: | Rev # 1 | Description: Modified step #15 | Date Revised: | 11/14/2016 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: Modified Steps 13 through 17.f | Date Revised: | 1/10/2018 | Approved by: (Name/Title) | Janine Irwin-Webb, Sr. Specialist Customer Service |

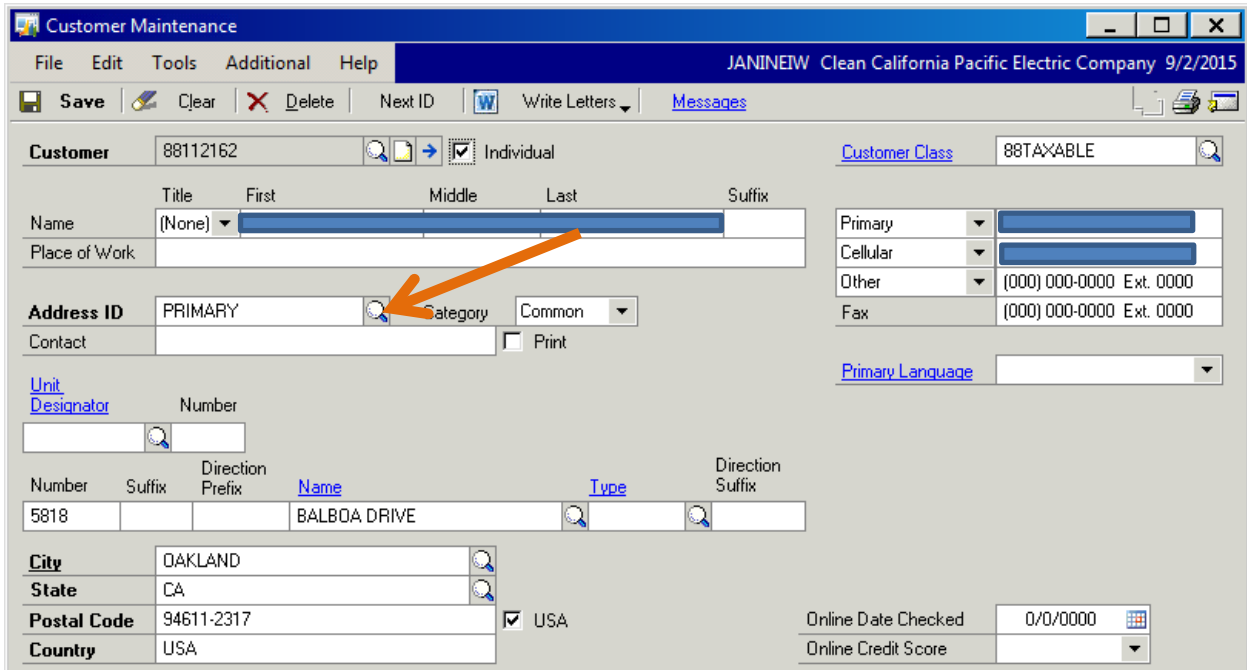
9. Close (X) out of screen



10. Account card appears

11. Click on Customer link

12. Customer Maintenance screen appears

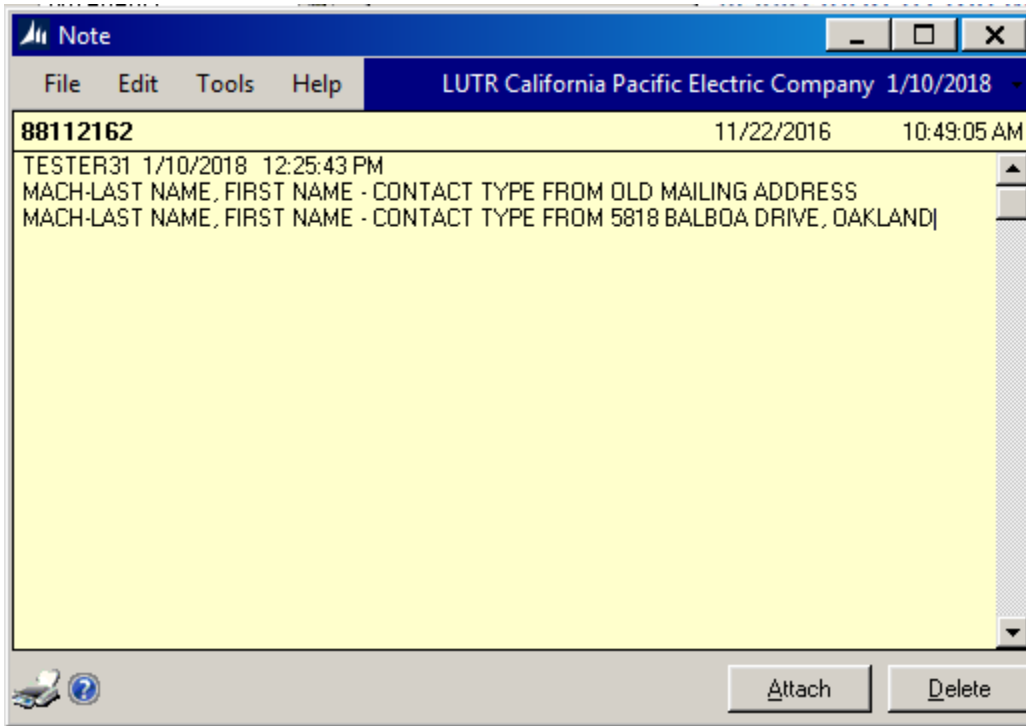


13. Prior to updating mailing address – create customer note

14. Click on Customer Note Pad

15. Enter appropriate note: i.e. MACH – LAST NAME, FIRST NAME – CONTACT TYPE – FROM (old mailing address)

| | | | | | | |
|-------------------------|---|---|----------------|------------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 9/2/2015 | | |
| Approved by Name/Title: | Michele Piechocinski; Foreman Customer Care Frontline | | Date Approved: | 9/8/2015 | | |
| Revision History: | Rev # 1 | Description: Modified step #15 | Date Revised: | 11/14/2016 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: Modified Steps 13 through 17.f | Date Revised: | 1/10/2018 | Approved by: (Name/Title) | Janine Irwin-Webb, Sr. Specialist Customer Service |



16. Click Attach

17. Modify current mailing address per customer request.

NOTE: “Primary” must always be the “Address ID” type.

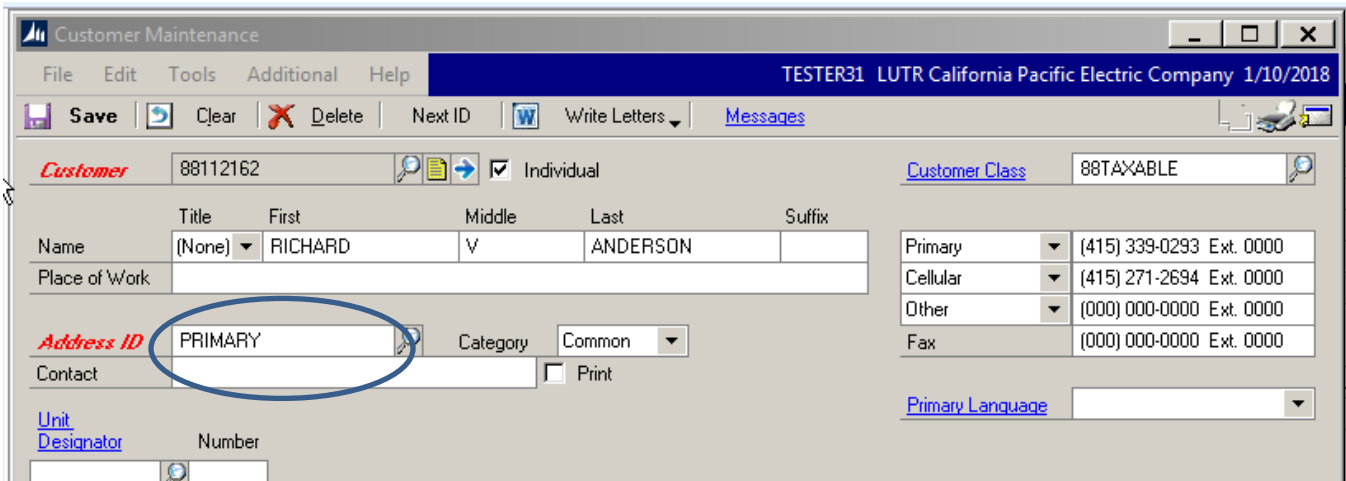
- i. Is current mailing address M1? STOP! – Review account does this customer have multiple locations in their name?
- ii. Does “Primary” address exist in addressing table?

Yes – Select “Primary” – do not change your customer note. Change “Primary” to M1 or next sequential number, i.e. M2 etc.

No – Select “Primary” from Address ID field in next step (“a”).

- a. If current mailing address is “Primary” change address ID from “Primary” to “M1” If M1 has been used – move to next sequential number; i.e M2.

| | | | | | | |
|-------------------------|---|---|----------------|------------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 9/2/2015 | | |
| Approved by Name/Title: | Michele Piechocinski; Foreman Customer Care Frontline | | Date Approved: | 9/8/2015 | | |
| Revision History: | Rev # 1 | Description: Modified step #15 | Date Revised: | 11/14/2016 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: Modified Steps 13 through 17.f | Date Revised: | 1/10/2018 | Approved by: (Name/Title) | Janine Irwin-Webb, Sr. Specialist Customer Service |



Customer Maintenance - TESTER31 LUTR California Pacific Electric Company 1/10/2018

Customer: 88112162 Individual

Name: (None) RICHARD V ANDERSON

Address ID: PRIMARY

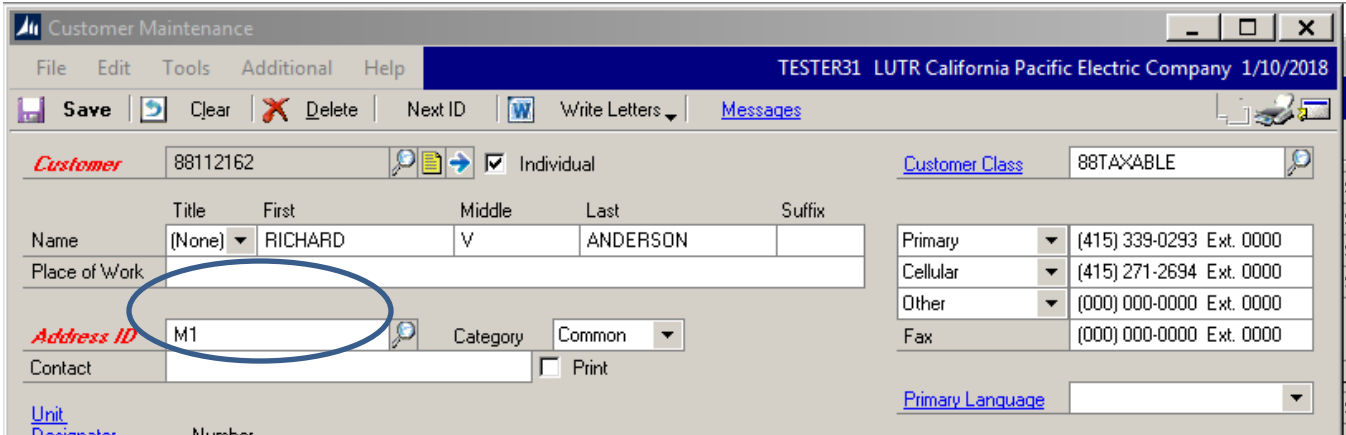
Customer Class: 88TAXABLE

Primary: (415) 339-0293 Ext. 0000

Cellular: (415) 271-2694 Ext. 0000

Other: (000) 000-0000 Ext. 0000

Fax: (000) 000-0000 Ext. 0000



Customer Maintenance - TESTER31 LUTR California Pacific Electric Company 1/10/2018

Customer: 88112162 Individual

Name: (None) RICHARD V ANDERSON

Address ID: M1

Customer Class: 88TAXABLE

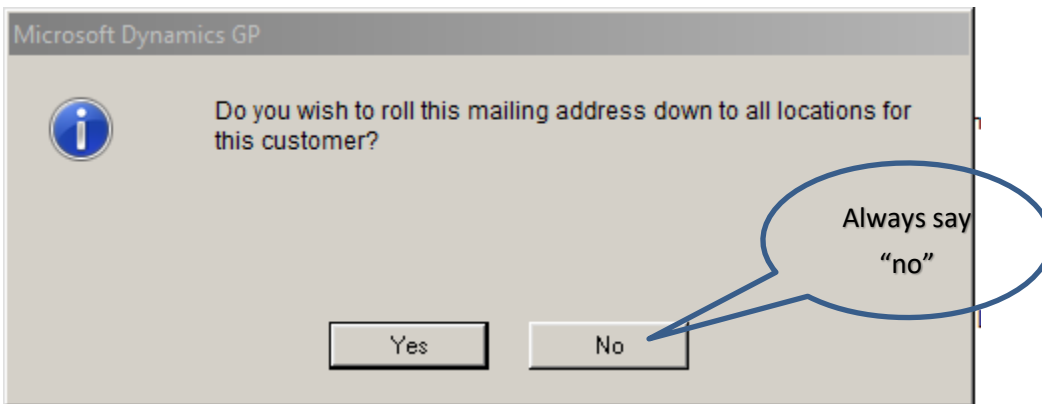
Primary: (415) 339-0293 Ext. 0000

Cellular: (415) 271-2694 Ext. 0000

Other: (000) 000-0000 Ext. 0000

Fax: (000) 000-0000 Ext. 0000

- i. Click SAVE
- ii. Pop Up message appears



Microsoft Dynamics GP

Do you wish to roll this mailing address down to all locations for this customer?

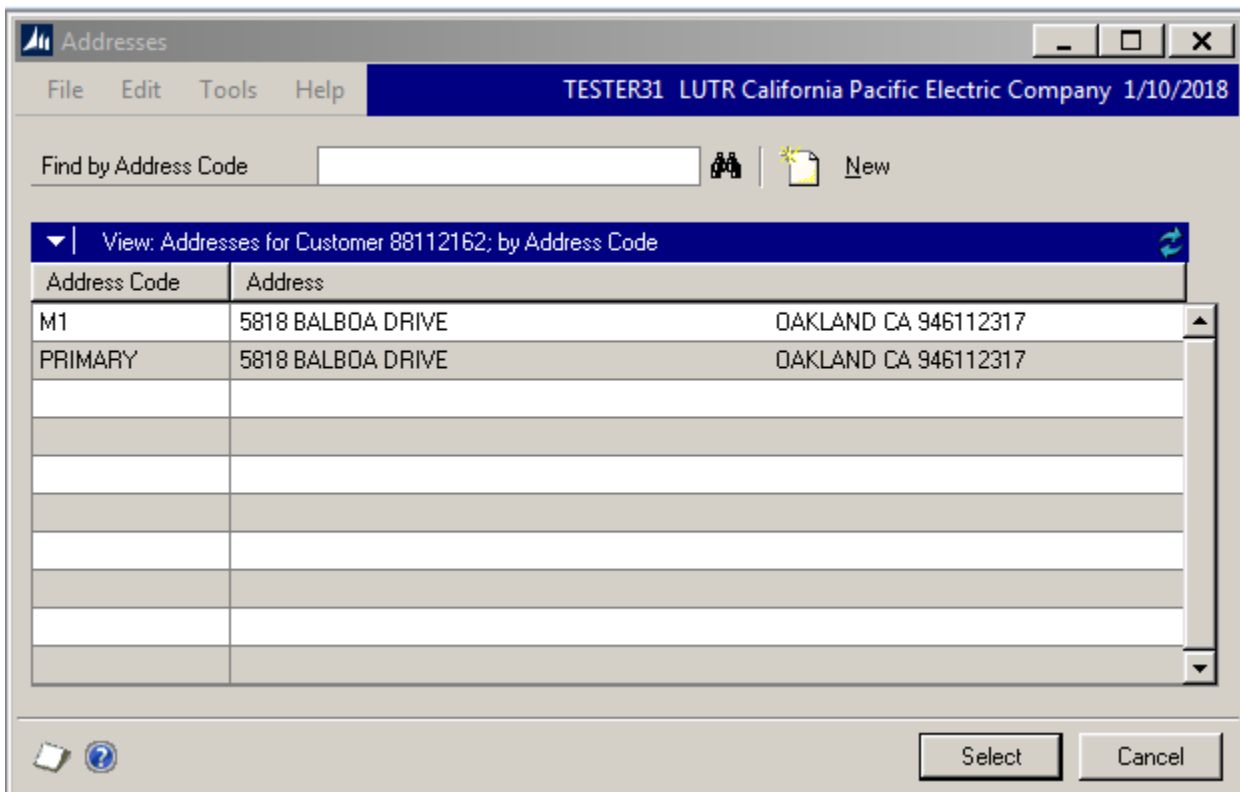
Yes No

Always say "no"

- iii. Click No

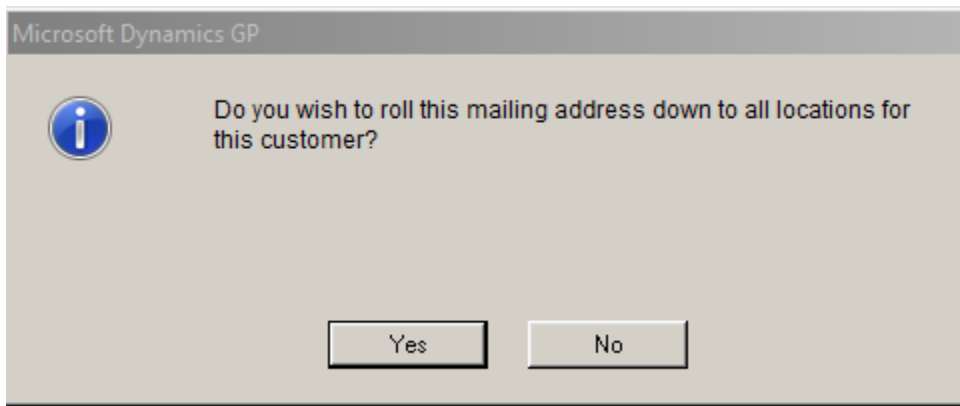
| | | | | | | |
|-------------------------|---|---|----------------|------------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 9/2/2015 | | |
| Approved by Name/Title: | Michele Piechocinski; Foreman Customer Care Frontline | | Date Approved: | 9/8/2015 | | |
| Revision History: | Rev # 1 | Description: Modified step #15 | Date Revised: | 11/14/2016 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: Modified Steps 13 through 17.f | Date Revised: | 1/10/2018 | Approved by: (Name/Title) | Janine Irwin-Webb, Sr. Specialist Customer Service |

- iv. Click SAVE
- v. Customer Maintenance screen becomes blank
- vi. Close (X) out of screen
- vii. Account card reappears
- viii. Click on Customer Link
- ix. Customer Maintenance screen appears
- x. Click on Address ID look up icon



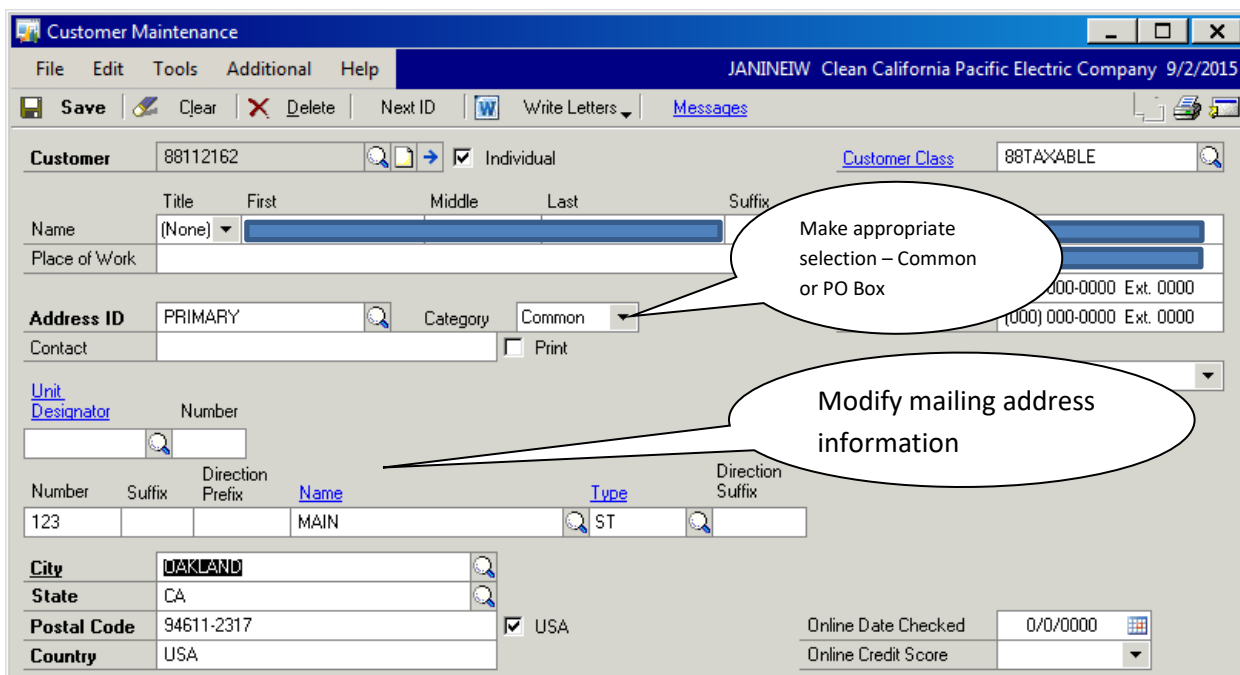
- xi. Review information; there should be an “M” and “Primary” address with the same information.
- xii. Highlight “Primary” – click “Select”
- xiii. Pop Up message appears

| | | | | | | |
|-------------------------|---|---|----------------|------------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 9/2/2015 | | |
| Approved by Name/Title: | Michele Piechocinski; Foreman Customer Care Frontline | | Date Approved: | 9/8/2015 | | |
| Revision History: | Rev # 1 | Description: Modified step #15 | Date Revised: | 11/14/2016 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: Modified Steps 13 through 17.f | Date Revised: | 1/10/2018 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |



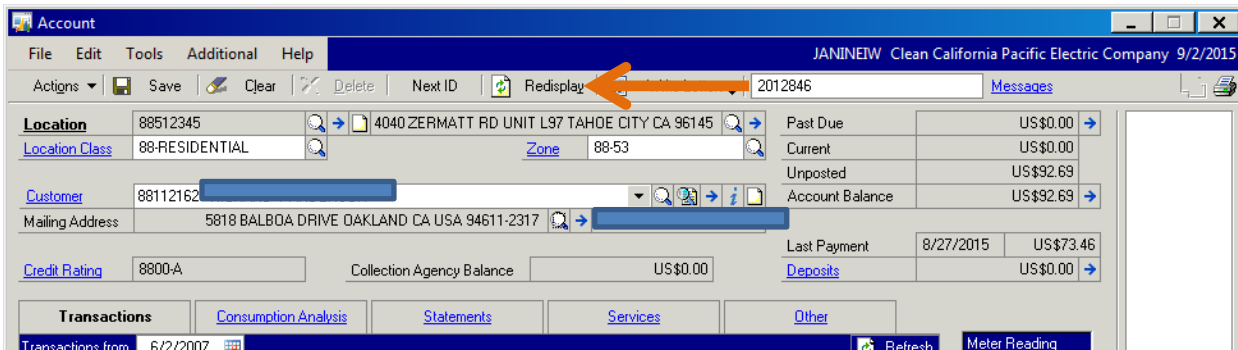
xiv. Click “No”

xv. Enter new mailing address information – type over old information if the category type remains the same. If not input new type and new information

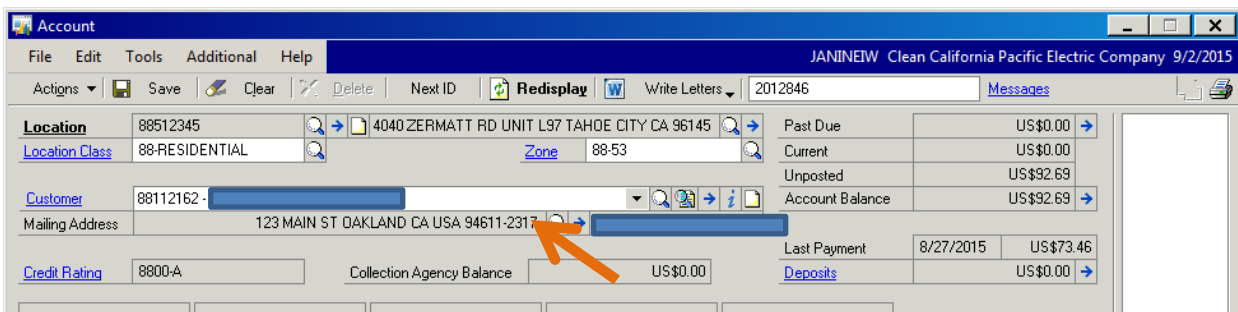


- b. Click SAVE
- c. Close out (X) of screen
- d. Account card appears

| | | | | | | |
|-------------------------|---|---|----------------|------------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 9/2/2015 | | |
| Approved by Name/Title: | Michele Piechocinski; Foreman Customer Care Frontline | | Date Approved: | 9/8/2015 | | |
| Revision History: | Rev # 1 | Description: Modified step #15 | Date Revised: | 11/14/2016 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: Modified Steps 13 through 17.f | Date Revised: | 1/10/2018 | Approved by: (Name/Title) | Janine Irwin-Webb, Sr. Specialist Customer Service |



e. Click redisplay



f. Mailing address information updates with new mailing address

NOTE: If this mailing address has an effect on the customer's billing rate that requires Declaration of Eligibility for Permanent Residential Baseline Rates refer to Rate Change work instruction.

Results: You have successfully zoned a customer's mailing address for one (1) location.

| | | | | | | |
|-------------------------|---|---|----------------|------------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 9/2/2015 | | |
| Approved by Name/Title: | Michele Piechocinski; Foreman Customer Care Frontline | | Date Approved: | 9/8/2015 | | |
| Revision History: | Rev # 1 | Description: Modified step #15 | Date Revised: | 11/14/2016 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: Modified Steps 13 through 17.f | Date Revised: | 1/10/2018 | Approved by: (Name/Title) | Janine Irwin-Webb, Sr. Specialist Customer Service |

SERVICE ORDER STANDARDIZED COMMENTS

TURN METER ON = TONN or READ METER = REON

OWNER

DATE - ACTION - LAST NAME, FIRST NAME PHSS# or IOSS# or NOTRZD SS# - CREF OWNER - PRIM / NON PRIM

DATE - ACTION - LAST NAME, FIRST NAME PHSS# or IOSS# or NOTRZD SS# - OWNER BD CREF \$ 0.00 DEP - PRIM / NON PRIM

DATE - ACTION - LAST NAME, FIRST NAME PHSS# OR NOTRZS SS# - OWNER BD CREF - COVID19 WAV \$ DEP - PRIM /NON PRIM

EQUIFAX - SCOR

DATE - ACTION - LAST NAME, FIRST NAME PHSS# or IOSS# or NOTRZD SS# - GD SCOR - PRIM / NON PRIM

DATE - ACTION - LAST NAME, FIRST NAME PHSS# or IOSS# or NOTRZD SS# - LO SCOR \$ 0.00 DEP - PRIM / NON PRIM

DATE - ACTION - LAST NAME, FIRST NAME PHSS# OR NOTRZS SS# - LO SCOR COVID19 WAV \$DEP - PRIM /NON PRIM

NO EQUIFAX - SCOR

DATE - ACTION - LAST NAME, FIRST NAME PHSS# or IOSS# or NOTRZD SS# - RFSD SCOR \$ 0.00 DEP - PRIM / NON PRIM

DATE - ACTION - LAST NAME, FIRST NAME PHSS# or IOSS# or NOTRZD SS# - CREF - PRIM / NON PRIM

DATE - ACTION - LAST NAME, FIRST NAME PHSS# or IOSS# or NOTRZD SS# - BD CREF \$ 0.00 DEP - PRIM / NON PRIM

DATE - ACTION - LAST NAME, FIRST NAME PHSS# or NOTRZD SS# - RFSD SCOR - COVID19 WAV \$DEP - PRIM / NON PRIM

LANDLORD

DATE - REON - CILL NON PRIM LAST NAME, FIRST NAME (STO) / LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD - FBMA OK / FBMACH

DATE - REON - CILL NON PRIM LAST NAME, FIRST NAME (STO) / LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD - CMTO xxxxxxxx DATE - FBMA OK / FBMACH

TURN OFF METER = TOFF

DATE - ACTION - NOLL - LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD - FBMA OK

DATE - ACTION - NOLL - LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD - FBMACH

TRANSFERS - TOFF

DATE - ACTION - NOLL - LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD- CMTO xxxxxxxx DATE - FBMA OK

DATE - ACTION - NOLL - LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD- CMTO xxxxxxxx DATE - FBMACH

TRANSFERS - TONN / REON

DATE - ACTION - LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD - CMIF xxxxxxxx DATE - CREF - PRIM / NON PRIM - XFR CARE / EFT

DATE - ACTION - LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD- CMIF xxxxxxxx DATE - BD CREF \$ 0.00 DEP - PRIM / NON PRIM - XFR CARE / EFT

DATE - ACTION -LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD - APPLY DEP - CMTO xxxxxxxx DATE - XFR CARE / EFT

CANCEL - TONN / TOFF / REON

DATE - CNCL - ACTION - ACTION -LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD

SERVICE ORDER STANDARDIZED COMMENTS

GREEN CROSS - REON TO NEW CUSTOMER - GRNX CUST MOVED OUT

DATE - ACTION - LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD - DEP - PRIM / NON PRIM ***REMOVE MEDICAL SEAL***

GREEN CROSS - REON TO NEW CUSTOMER - GRNX CUST MOVING IN

DATE - ACTION - LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD - CMIF XXXXXX - DATE - DEP - PRIM / XFR GRNX / CARE / EFT ***INSTALL MEDICAL SEAL***
or ***DO NOT REMOVE MEDICAL SEAL***

GREEN CROSS - REON TO NEW CUSTOMER - TRANSFERRING SERVICE

DATE - ACTION - LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD - CMIF XXXXXX - DATE - DEP - PRIM / NON PRIM ***REMOVE MEDICAL SEAL***
DATE - ACTION - LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD - CMTO XXXXXX DATE - FBMA OK or FBMA CH - ***REMOVE MEDICAL SEAL***

GREEN CROSS - REON TO STANDING ORDER

DATE - ACTION - LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD - CMTO XXXXXX DATE - FBMA OK or FBMA CH - ***REMOVE MEDICAL SEAL***

GREEN CROSS -TOFF

DATE - ACTION - NOLL - LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD - FBMA OK or FBMA CH - ***REMOVE MEDICAL SEAL***

GREEN CROSS - REMOVE MEDICAL SEAL ONLY

DATE - REMOVE MEDICAL SEAL - LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD - REASON FOR REMOVAL I.E. OCCUPANT DECEASED

RECON - OPEN DNP

DATE - RECON - LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD- PAID \$ XXXX CONF # XXXXX DEP \$ XXXXX

RECON - CLOSED DNP - MR VACANT

DATE - RECON - LAST NAME, FIRST NAME PHSS# or IOSS# or PSWD - PAID \$ XXXXX CONF # XXXXX DEP \$ XXXXX



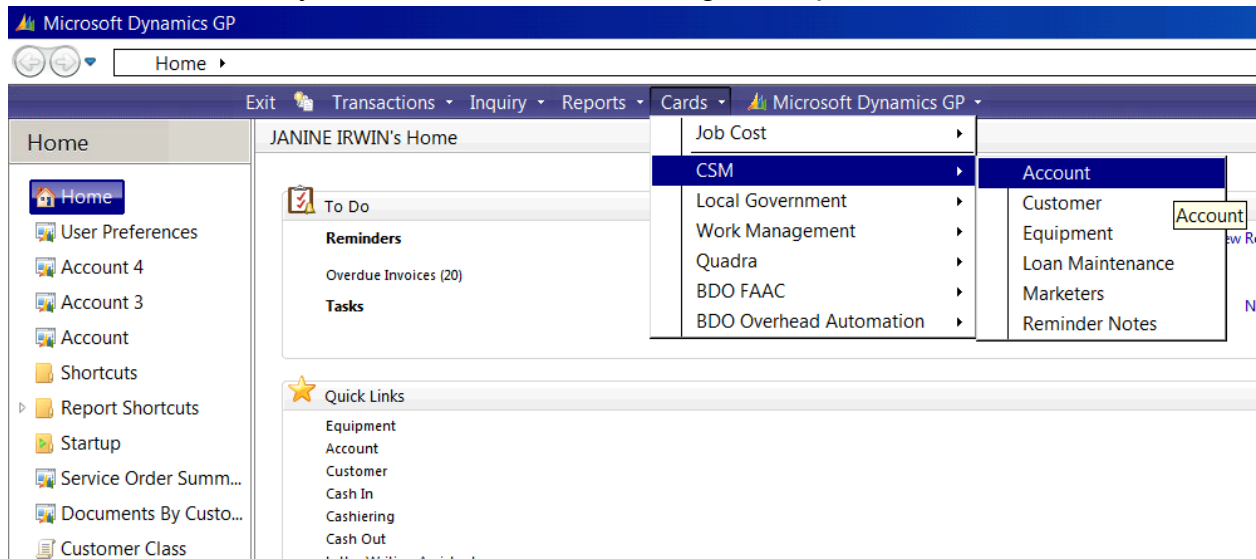
Title / Name: Move In New Customer – Turn On

| | | | |
|----------------------|----------------------|--------------------------|-------------------|
| GP System #: | 8800 | Discipline: | 700 Customer Care |
| Sub-Category: | 900 Work Instruction | Sequential Doc. # | 0745 |
| State: | California | Commodity: | Electric |

Purpose: Create a Move In service order for a New Customer – Services are off in the field (aka Mr. Vacant).

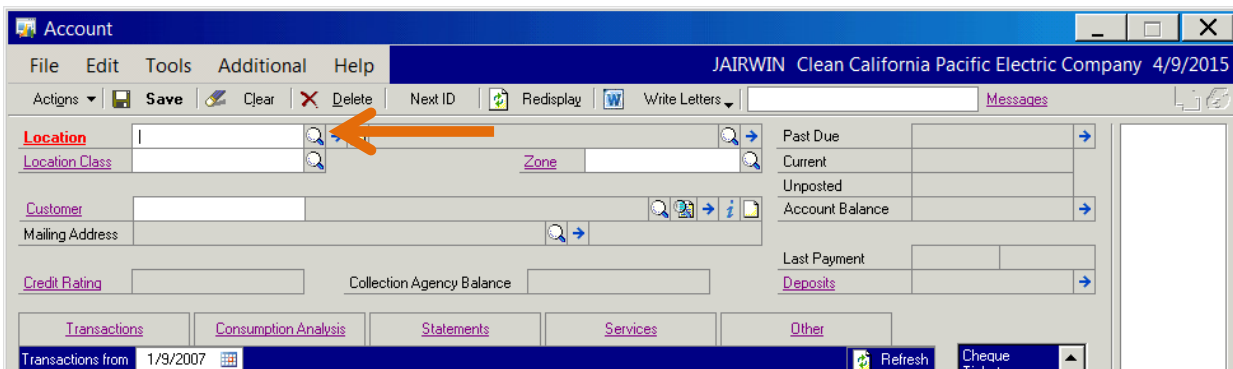
Pre-Requisite: Customer Inquiry search determined Customer has or does not have an existing Customer Number. Services are off in the field.


1. From Microsoft Dynamics GP use the following menu path Cards > CSM > Account



2. Account screen appears

| | | | | | | |
|--------------------------------|---|--------------------------------|-----------------------|-----------|----------------------------------|--|
| Created by: | BPDI Project | | Date Created: | 4/10/2015 | | |
| Approved by Name/Title: | Tami Fruhwirth Sr. Mgr. Customer Care / Chris Garcia CCB Supvr. / Sharie Lewis CCF Supvr. | | Date Approved: | 5/14/2015 | | |
| Revision History: | Rev # 1 | Description: Revised Step # 14 | Date Revised: | 1/18/2018 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: | Date Revised: | Click | Approved by (Name/Title) | |

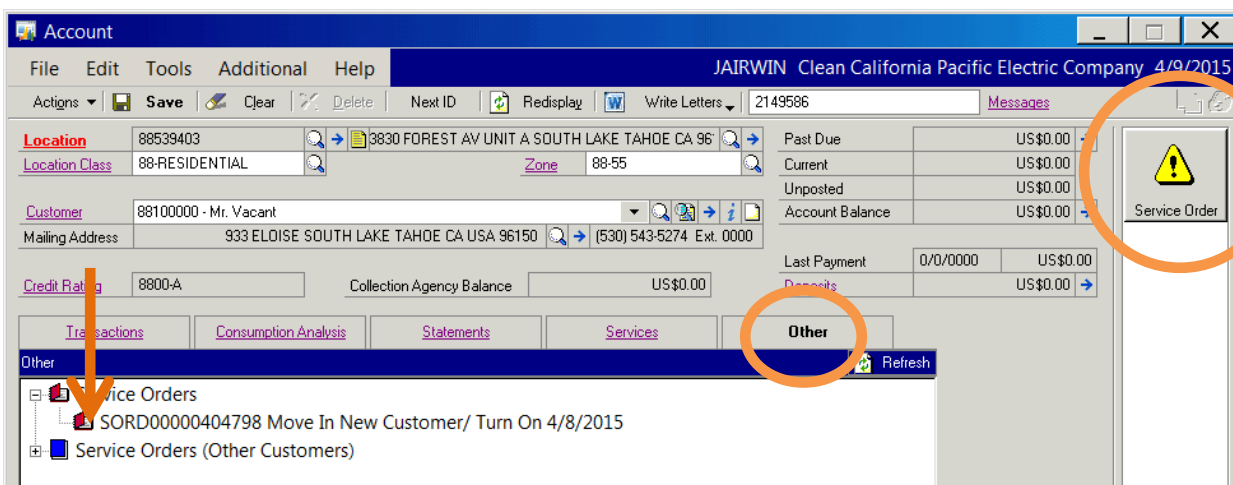


3. Enter the Location Number. Press Tab to update the screen. **NOTE:** *If you do not know the Location Number, use the Search  button*

4. Review for open pending service orders: Click on Other link

Example: Open Pending service order

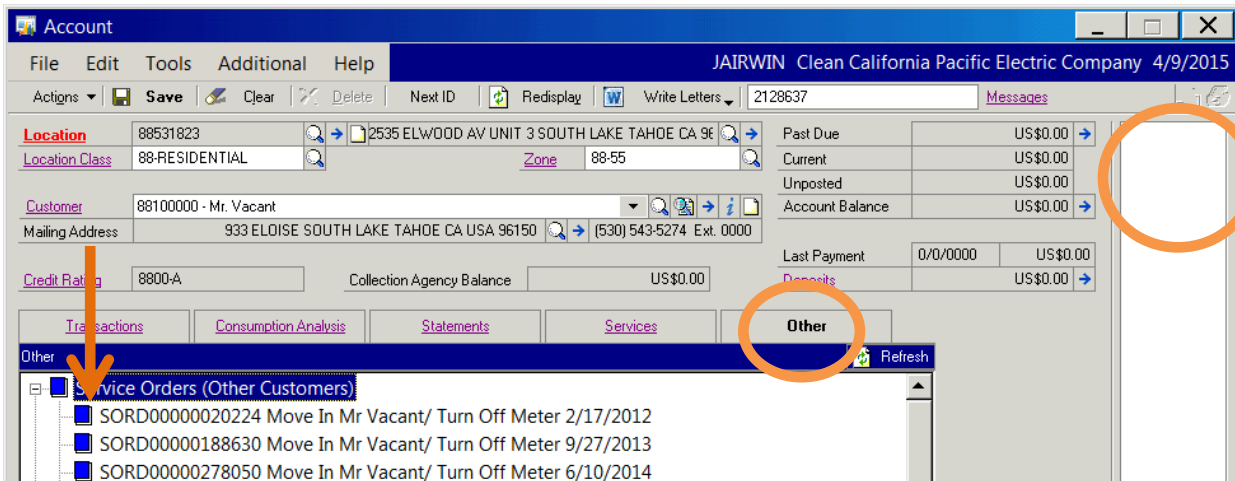
- Service Order icon appears on far right
- Via Other link Open (**Red Book**) icon displays



Example: No Open Pending service order

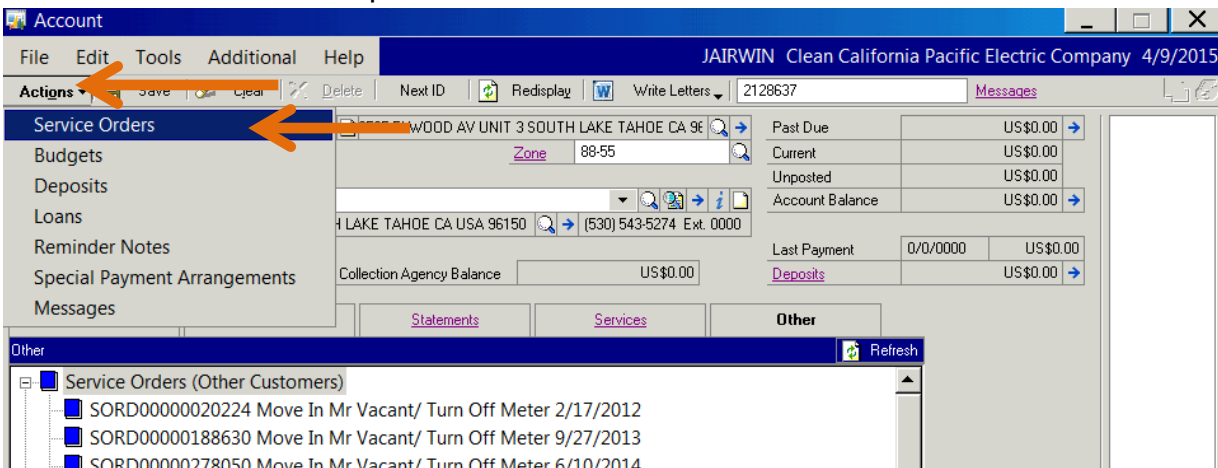
- **NO** Service Order icon appears on far right
- Via Other link **NO** Open (**Red Book**) icon displays

| | | | | | | |
|-------------------------|---|--------------------------------|----------------|-----------|---------------------------|--|
| Created by: | BPMI Project | | Date Created: | 4/10/2015 | | |
| Approved by Name/Title: | Tami Fruhwirth Sr. Mgr. Customer Care / Chris Garcia CCB Supvr. / Sharie Lewis CCF Supvr. | | Date Approved: | 5/14/2015 | | |
| Revision History: | Rev # 1 | Description: Revised Step # 14 | Date Revised: | 1/18/2018 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: | Date Revised: | Click | Approved by: (Name/Title) | |



5. Take appropriate actions for Open pending service order if applicable

6. Click on ACTIONS dropdown menu – Select Service Orders



7. Service Order Entry screen appears

NOTE: You will be performing two (2) tasks here: Creating a service order and creating a new Customer record.

| | | | | | | |
|-------------------------|---|--------------------------------|----------------|-----------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 4/10/2015 | | |
| Approved by Name/Title: | Tami Fruhwirth Sr. Mgr. Customer Care / Chris Garcia CCB Supvr. / Sharie Lewis CCF Supvr. | | Date Approved: | 5/14/2015 | | |
| Revision History: | Rev # 1 | Description: Revised Step # 14 | Date Revised: | 1/18/2018 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: | Date Revised: | Click | Approved by: (Name/Title) | |

Service Order Entry JAIWIN Clean California Pacific Electric Company 4/9/2015

File Edit Tools Copy Additional Help Save Save and Clear Delete Cancel Clear Print Write Letters Print Service Order

Service Order: Status: Pending

Request: Origin: Internal Priority:

Description: User ID: JAIWIN

Reason Code:

Requested Date: 4/9/2015 Scheduled Date:

Requested Time: 12:43:42 PM Scheduled Time:

Customer Requested Date

Location: 88531823 2535 ELWOOD AV UNIT 3 SOUTH LAKE TAHOE CA USA 96150

Customer: 88100000 Mr. Vacant 933 ELOISE SOUTH LAKE TAHOE CA USA 96150


Equipment: Equipment Inventory Asset

Requested By: Bill To

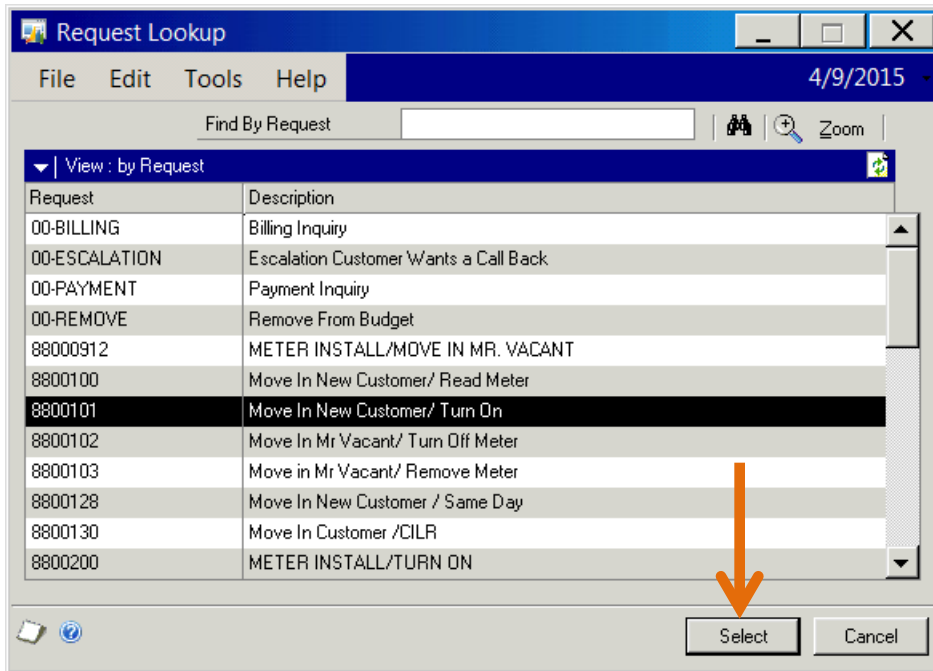
Customer Billed: 88100000 Mr. Vacant 933 ELOISE SOUTH LAKE TAHOE CA USA 96150

| Ordered | Completed | Print | Task | Description | Employee | Scheduled Date | Scheduled Time | Charge Amount | |
|--------------------------|--------------------------|--------------------------|------------|-------------|----------|----------------|----------------|----------------|-----------------|
| Document Number | Equipment | Billable | Start Date | Start Time | End Date | End Time | Dispatch Date | Dispatch Time | Cross Reference |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | | | | 0/0/0000 | 12:00:00 AM | US\$0.00 |
| | | | | | | | Total Cost | Total Invoiced | |

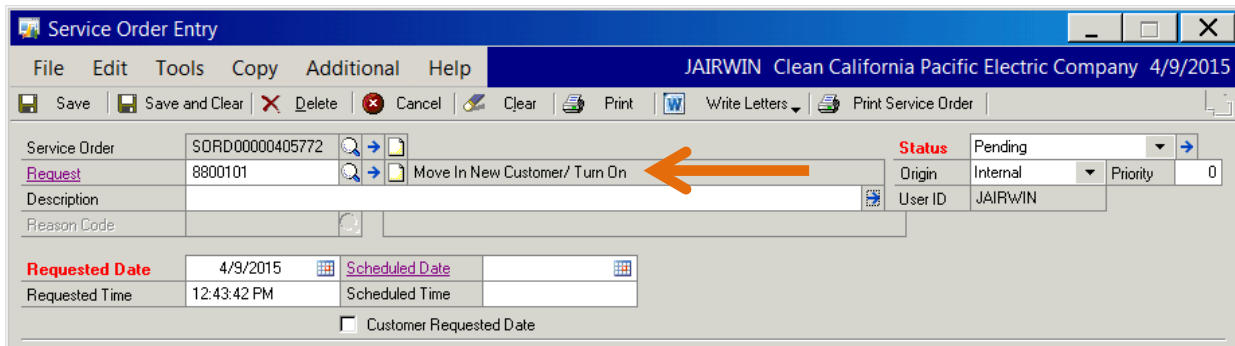
Navigation: |< < > >| by Document Number

8. Click the Request search  button
9. Request Lookup screen appears

| | | | | | | |
|-------------------------|---|--------------------------------|----------------|-----------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 4/10/2015 | | |
| Approved by Name/Title: | Tami Fruhwirth Sr. Mgr. Customer Care / Chris Garcia CCB Supvr. / Sharie Lewis CCF Supvr. | | Date Approved: | 5/14/2015 | | |
| Revision History: | Rev # 1 | Description: Revised Step # 14 | Date Revised: | 1/18/2018 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: | Date Revised: | Click | Approved by (Name/Title): | |

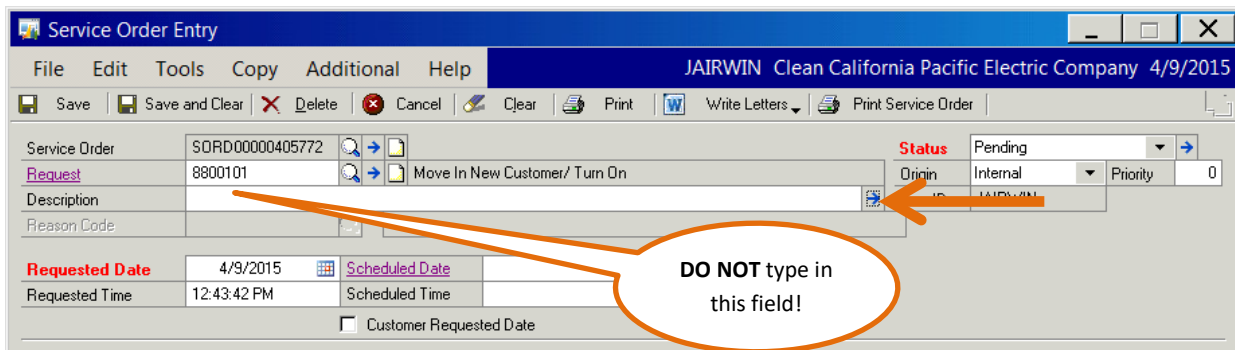


10. Select the Request Type. Click the Select button **NOTE:** Use request type 8800101 for Move In New Customer / Turn On



11. Click the blue arrow icon at the end of the Description field

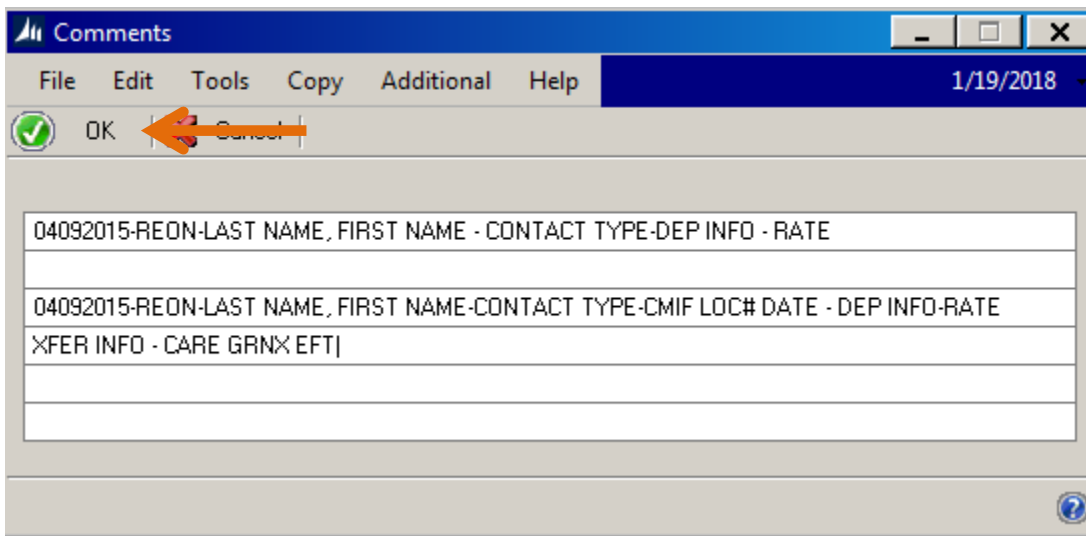
| | | | | | | |
|--------------------------------|---|--------------------------------|-----------------------|-----------|----------------------------------|--|
| Created by: | BPDI Project | | Date Created: | 4/10/2015 | | |
| Approved by Name/Title: | Tami Fruhwirth Sr. Mgr. Customer Care / Chris Garcia CCB Supvr. / Sharie Lewis CCF Supvr. | | Date Approved: | 5/14/2015 | | |
| Revision History: | Rev # 1 | Description: Revised Step # 14 | Date Revised: | 1/18/2018 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: | Date Revised: | Click | Approved by (Name/Title): | |



13. Comment note pad appears

14. Enter service order notes

NOTE: If the move in bill to customer is transferring services, service order note needs to state CMIF information.



15. Click OK

16. Service Order Entry reappears

17. Tab to "REQUESTED DATE" field. Date automatically populates with today's date.

18. Tab to "SCHEDULED DATE" field. Enter date of select date from calendar icon.

19. Press Tab Key

| | | | | | | |
|-------------------------|---|--------------------------------|----------------|-----------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 4/10/2015 | | |
| Approved by Name/Title: | Tami Fruhwirth Sr. Mgr. Customer Care / Chris Garcia CCB Supvr. / Sharie Lewis CCF Supvr. | | Date Approved: | 5/14/2015 | | |
| Revision History: | Rev # 1 | Description: Revised Step # 14 | Date Revised: | 1/18/2018 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: | Date Revised: | Click | Approved by (Name/Title): | |

Service Order Entry | JAIRWIN Clean California Pacific Electric Company 4/9/2015

File Edit Tools Copy Additional Help

Save Save and Clear Delete Cancel Clear Print Write Letters Print Service Order

Service Order: SORD0000 405772 | Status: Pending

Request: 8800101 | Move In New Customer/ Turn On

Origin: Internal | Priority: 0

User ID: JAIRWIN

Requested Date: 4/9/2015 | Scheduled Date: 4/9/2015

Requested Time: 12:43:42 PM | Scheduled Time: 12:00:00 AM

Location: 88531823 | 2535 ELWOOD AV UNIT 3 SOUTH LAKE TAHOE CA USA 96150

Customer: 88100000 | Mr. Vacant | 933 ELOISE SOUTH LAKE TAHOE CA USA 96150

Equipment: Equipment Inventory Asset

Requested By: Bill To

Move In Customer

Customer Billed: 88100000 | Mr. Vacant | 933 ELOISE SOUTH LAKE TAHOE CA USA 96150

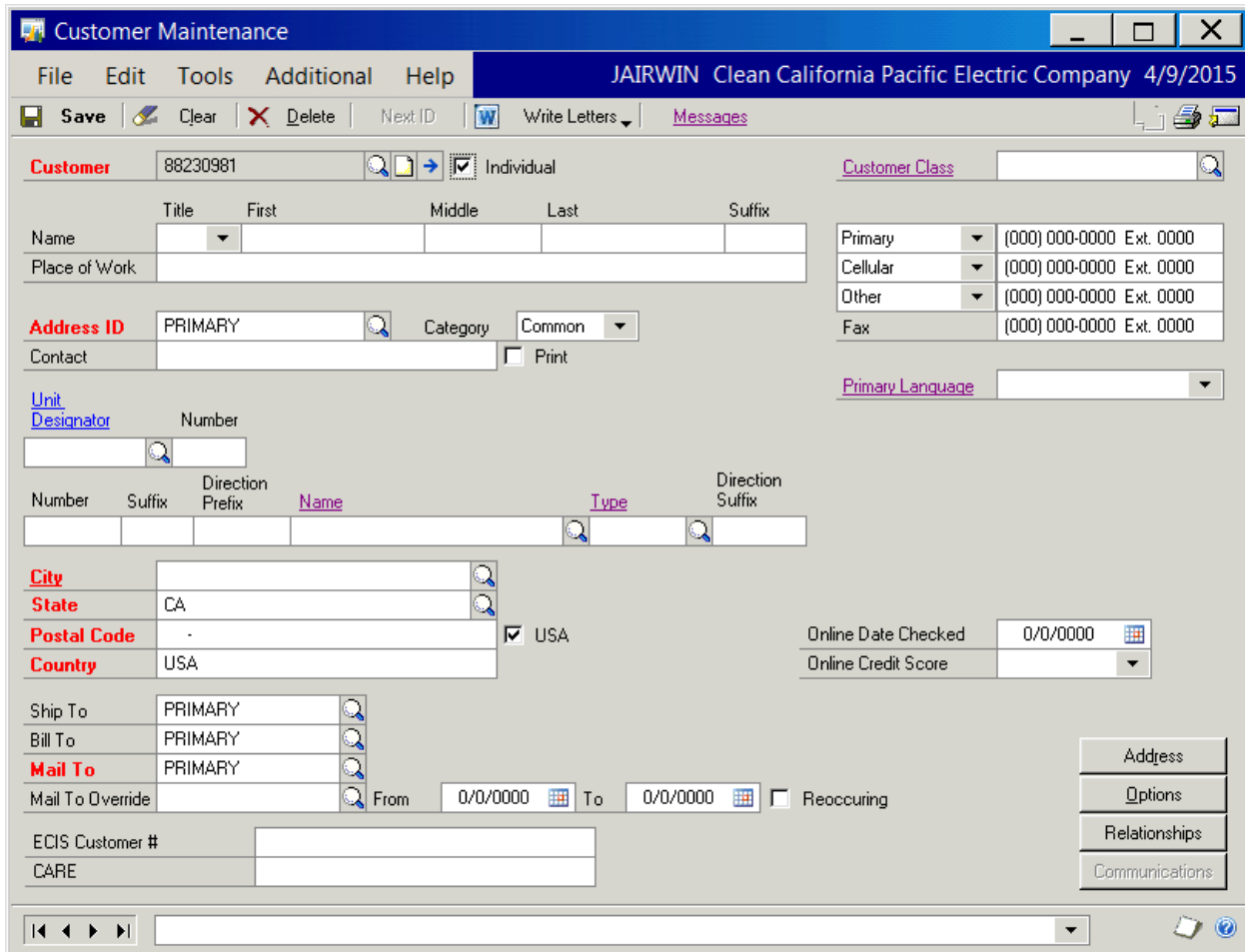
| Ordered | Completed | Print | Task | Description | Employee | Scheduled Date | Scheduled Time | Charge Amount | |
|--------------------------|--------------------------|-------------------------------------|---------------|--------------------------------|----------|----------------|----------------|----------------|-----------------|
| Document Number | Equipment | Billable | Start Date | Start Time | End Date | End Time | Dispatch Date | Dispatch Time | Cross Reference |
| <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | READ | Read Meter | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | HISTORY | Move read from open to history | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | UPDATE GRNX | Update Greencross Settings | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | TURN ON | Turn On Meter | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | CARE | Customer on CARE? | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | EFT | TRANSFER EFT TO NEW LOCATION | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | BAD DEBT | Bad Debt in ECIS Only | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | NC EST CHARGE | New Customer Establishment Fee | | 0/0/0000 | 12:00:00 AM | US\$25.00 | |
| | | | | | | | Total Cost | Total Invoiced | |

by Document Number

NOTE: If a Customer Number exists – Enter existing customer number in field.

20. Click on Move In Customer link
21. Customer Maintenance screen appears

| | | | | | | |
|-------------------------|---|--------------------------------|----------------|-----------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 4/10/2015 | | |
| Approved by Name/Title: | Tami Fruhwirth Sr. Mgr. Customer Care / Chris Garcia CCB Supvr. / Sharie Lewis CCF Supvr. | | Date Approved: | 5/14/2015 | | |
| Revision History: | Rev # 1 | Description: Revised Step # 14 | Date Revised: | 1/18/2018 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: | Date Revised: | Click | Approved by (Name/Title): | |



22. Customer field automatically populates with NEXT customer ID number

NOTE: NEXT ID button is greyed out

23. Create Customer record. Refer to New Customer – Create work instruction

24. Once completed – Service Order Entry screen reappears

NOTE: Move In Customer field is now populated with new customer name and mailing address.

| | | | | | | |
|-------------------------|---|--------------------------------|----------------|-----------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 4/10/2015 | | |
| Approved by Name/Title: | Tami Fruhwirth Sr. Mgr. Customer Care / Chris Garcia CCB Supvr. / Sharie Lewis CCF Supvr. | | Date Approved: | 5/14/2015 | | |
| Revision History: | Rev # 1 | Description: Revised Step # 14 | Date Revised: | 1/18/2018 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: | Date Revised: | Click | Approved by: (Name/Title) | |

Service Order Entry | JAIRWIN Clean California Pacific Electric Company 4/9/2015

File Edit Tools Copy Additional Help | Save Save and Clear Delete Cancel Clear Print Write Letters Print Service Order

Service Order: SORD00000405772 | Status: Pending
 Request: 8800101 | Move In New Customer/ Turn On | Origin: Internal | Priority: 0
 Description: | User ID: JAIRWIN
 Reason Code: |

Requested Date: 4/9/2015 | Scheduled Date: 4/9/2015
 Requested Time: 12:43:42 PM | Scheduled Time: 12:00:00 AM
 Customer Requested Date

Location: 88531823 | 2535 ELWOOD AV UNIT 3 SOUTH LAKE TAHOE CA USA 96150
 Customer: 88100000 | Mr. Vacant | 933 ELOISE SOUTH LAKE TAHOE CA USA 96150
 Equipment: Equipment Inventory Asset

Requested By: Bill To

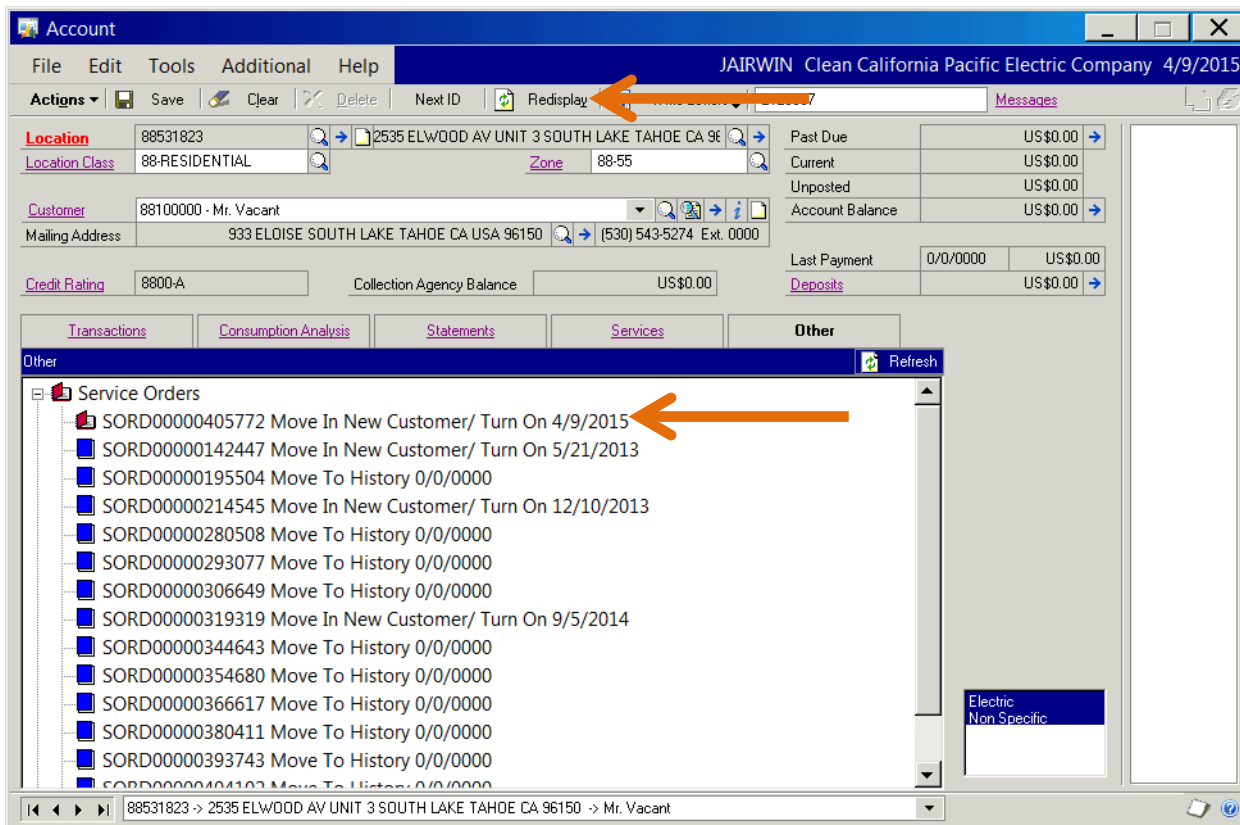
Move In Customer: 88260981 | MICKEY DISNEY | PO BOX 123 LOS ANGELES CA USA 12345
 Customer Billed: 88100000 | Mr. Vacant | 933 ELOISE SOUTH LAKE TAHOE CA USA 96150

| Ordered | Completed | Print | Task | Description | Employee | Scheduled Date | Scheduled Time | Charge Amount | |
|--------------------------|--------------------------|-------------------------------------|---------------|--------------------------------|----------|----------------|----------------|----------------|-----------------|
| Document Number | Equipment | Billable | Start Date | Start Time | End Date | End Time | Dispatch Date | Dispatch Time | Cross Reference |
| <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | READ | Read Meter | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | HISTORY | Move read from open to history | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | UPDATE GRNX | Update Greencross Settings | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | TURN ON | Turn On Meter | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | CARE | Customer on CARE? | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | EFT | TRANSFER EFT TO NEW LOCATION | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | BAD DEBT | Bad Debt in ECIS Only | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | NC EST CHARGE | New Customer Establishment Fee | | 0/0/0000 | 12:00:00 AM | US\$25.00 | |
| | | | | | | | Total Cost | Total Invoiced | |

Navigation: |<< < > >> by Document Number

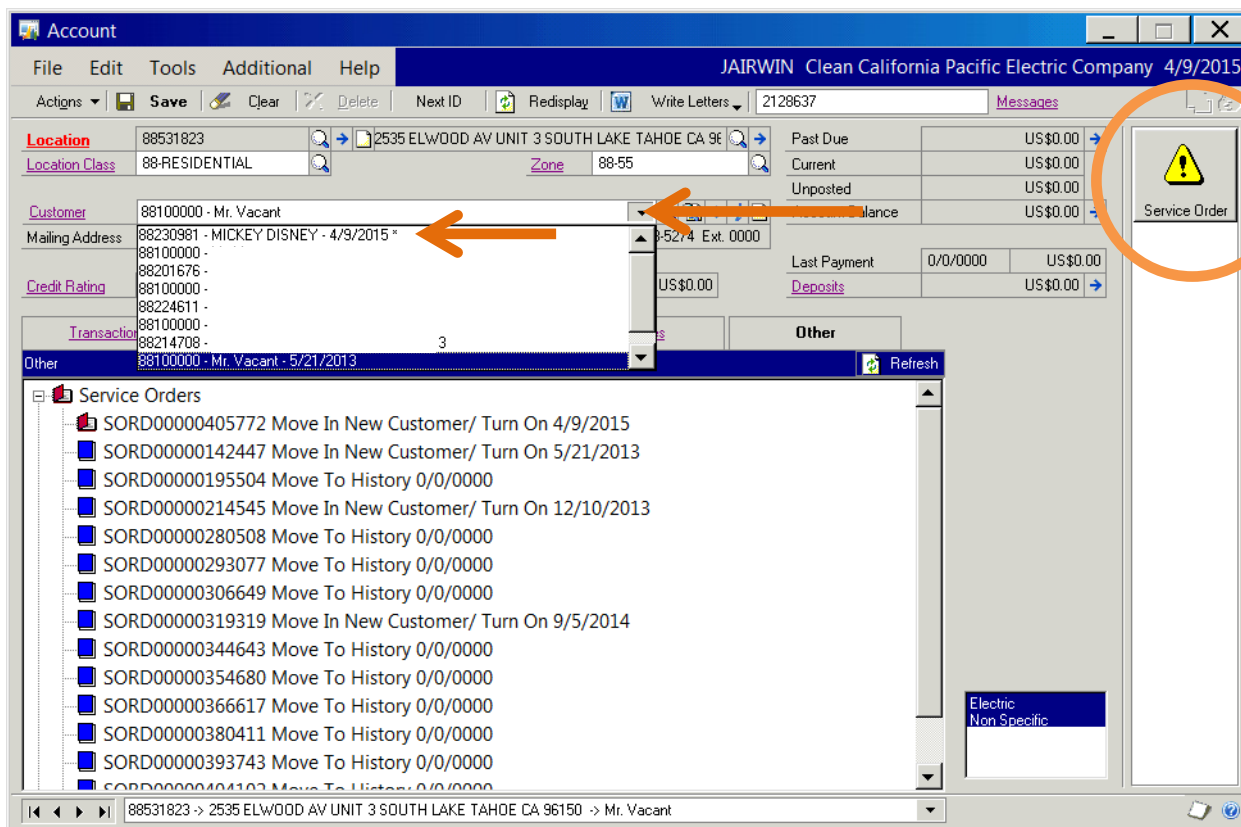
25. Review information is correct
26. Click SAVE
27. Close out of screen (X) twice
28. Account / Other screen appears

| | | | | | | |
|-------------------------|---|--------------------------------|----------------|-----------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 4/10/2015 | | |
| Approved by Name/Title: | Tami Fruhwirth Sr. Mgr. Customer Care / Chris Garcia CCB Supvr. / Sharie Lewis CCF Supvr. | | Date Approved: | 5/14/2015 | | |
| Revision History: | Rev # 1 | Description: Revised Step # 14 | Date Revised: | 1/18/2018 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: | Date Revised: | Click | Approved by (Name/Title): | |



29. Open pending (**Red Book**) service order displays
30. Click Redisplay button

| | | | | | | |
|-------------------------|---|--------------------------------|----------------|-----------|---------------------------|--|
| Created by: | BPMI Project | | Date Created: | 4/10/2015 | | |
| Approved by Name/Title: | Tami Fruhwirth Sr. Mgr. Customer Care / Chris Garcia CCB Supvr. / Sharie Lewis CCF Supvr. | | Date Approved: | 5/14/2015 | | |
| Revision History: | Rev # 1 | Description: Revised Step # 14 | Date Revised: | 1/18/2018 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: | Date Revised: | Click | Approved by (Name/Title): | |



31. Service Order icon appears on far right. Customer dropdown menu shows pending customer name and date of service order

Results: You have successfully created a new customer record and Move In – Turn On service order.

| | | | | | | |
|-------------------------|---|--------------------------------|----------------|-----------|---------------------------|--|
| Created by: | BPDI Project | | Date Created: | 4/10/2015 | | |
| Approved by Name/Title: | Tami Fruhwirth Sr. Mgr. Customer Care / Chris Garcia CCB Supvr. / Sharie Lewis CCF Supvr. | | Date Approved: | 5/14/2015 | | |
| Revision History: | Rev # 1 | Description: Revised Step # 14 | Date Revised: | 1/18/2018 | Approved by (Name/Title): | Janine Irwin-Webb, Sr. Specialist Customer Service |
| Revision History: | Rev # | Description: | Date Revised: | Click | Approved by (Name/Title): | |

NOTE FORMAT - CREATE

Location Note Pad

CIER / COER = CUT IN ERROR / CUT OUT IN ERROR

- CIER/COER - LAST NAME, FIRST NAME PHSS# S/B ACTIVE @ LOC # XXXXXX A/O MMDDYY - CUST # XXXXXXXX SHOULD BE ACTIVE HERE - SEE SERVICE ORDER
- CIER/COER - LAST NAME, FIRST NAME PHSS# S/B ACTIVE HERE - LMVM FOR LAST NAME, FIRST NAME - TO CALL OFC ND 2 KNOW WHAT LOCATION THEY SHOULD BE AT. SEE SERVICE ORDER

INFO = INFORMATION

- INFO - HOT PROPERTY - LAST NAME, FIRST NAME PHD TO ESTB SVC HERE - CLMS JUST MOVED IN - RQST LSE/RENTAL - DU2 PNDG DNP
- INFO - HOT PROPERTY - LAST NAME, FIRST NAME PHD TO ESTB SVC HERE - CLMS JUST MOVED IN - RQSTD LST/RNTL AGRMENT DUE TO LARGE PAST DU BAL FOR CURRENT B2C - ALSO HAS BD - ADVSD MUST PY PRIOR TO ESTB SVC - XFRD TO BM
- INFO - HOT PROPERTY - LAST NAME, FIRST NAME PHD TO ESTB SVC HERE - HAS BEEN LIVING HERE W/CURRENT B2C - ADVSD MUST BRING ACCT CURRENT B4 ESTB SVC IN THEIR NAME
- INFO - LAST NAME, FIRST NAME PHD TO ESTB SVC HERE - HAS BD FROM ACCT # XXXXXXXX - MUST PAY - CLMS WLPY OFC TODAY - QUOTED \$ XXX DEP
- INFO - LAST NAME, FIRST NAME PHD TO ESTB SVC HERE - HAS BD FROM ACCT # XXXXXXXX - MUST PAY - XFRD TO BM - QUOTED \$ XXX DEP
- INFO - LAST NAME, FIRST NAME PHD TO ESTB SVC HERE - HAS BD FROM ACCT # XXXXXXXX - CLMS WLML PYMT & CALL BACK IN 7 DAYS - QUOTED \$ XXX DEP

NET = NET METER

- NET MTR INSTL - LAST NAME, FIRST NAME - INSTALLED MTR # XXXXXXXX READ = XXXXX
- NET MTR RMVD - LAST NAME, FIRST NAME - REMOVED MTR # XXXXXXXX READ = XXXXX REASON IF APPLICABLE
- NET MTR EXCH - LAST NAME, FIRST NAME - RE# XXXXXXXX RD = XXXXX - IN# XXXXXXXX RD = XXXXX - REASON IF APPLICABLE
- NET MTR SURP - LAST NAME, FIRST NAME - ACCUM XXXXX KWH X RATE = \$\$\$\$\$ - RESET ACCUMULATED

SADR = SERVICE ADDRESS

- SADR - LAST NAME, FIRST NAME PHSS# - FROM XXX PER COUNTY ASSESSOR OFC

STO = STANDING ORDER

- STO - CUSTOMER # - LAST NAME, FIRST NAME ESTB STO - FORM O/F

STO RMVD = REMOVE STANDING ORDER

- STO RMVD - CUSTOMER # - LAST NAME, FIRST NAME RCVD CNCL STO O/F - HOUSE / PROPERTY SOLD
- STO RMVD - CUSTOMER # - LAST NAME, FIRST NAME PER LAST NAME, FIRST NAME PHSS# - NEW OWNER

NOTE FORMAT - CREATE

Customer Note Pad

AUTH = AUTHORIZATION CONTACT NAME

- AUTH - LAST NAME, FIRST NAME (Authorized customer name) PER LAST NAME, FIRST NAME (Active Bill to Customer of record name) PHSS#

AUTH POA = AUTHORIZATION POWER OF ATTORNEY

- AUTH POA - LAST NAME, FIRST NAME (POA customer name) per LAST NAME, FIRST NAME

BILL = BILLING

- BILL - LAST NAME, FIRST NAME PHSS# - HAS NOT RCVD BILL - STILL IN WORK - SENT INQ TO BILLING - SEE SERVICE ORDER
- BILL - LAST NAME, FIRST NAME PHSS# - HAS NOT RCVD BILL - NO READ DOC - SENT INQ TO BILLING - SEE SERVICE ORDER

B/L DEC = BASELINE DECLARATION

- B/L DEC - LAST NAME, FIRST NAME PHSS# - CLMS PRIM RES - SENT VIA USPS, EMAIL, FAX
- B/L DEC - LAST NAME, FIRST NAME PHSS# PER TONN/REON STATED PRIM W/OOA MA - SNT VIA USPS, EMAIL, FAX
- B/L DEC - LAST NAME, FIRST NAME PHSS# PER MACH
- B/L DEC - LAST NAME, FIRST NAME - FORM O/F FILE

BUDG = BUDGET / EPP (EQUAL PAYMENT PLAN) ESTABLISH

- BUDG - LAST NAME, FIRST NAME PHSS# - ESTB \$ XXXX CUST RQST

BUDG AUDIT= BUDGET AMOUNT CHANGE PER AUDIT

- BUDG AUDIT - LAST NAME, FIRST NAME - FROM \$\$\$ TO \$\$\$ PER AUDIT

BUDG CHG = BUDGET AMOUNT CHANGE - CUSTOMER REQUEST

- BUDG CHG - LAST NAME, FIRST NAME PHSS# - RQST INCREASE/DECEASED - INSTALL HOT TUB / REMOVED HOT TUB / PER AUDIT / PER SUO (SETTLE UP OFFER)

BUDG SUO = BUDGET SETTLE UP / OFFER

- BUDG SUO - LAST NAME, FIRST NAME FROM \$\$\$ TO \$\$\$ - BILL NOTE

BUDG RMV = BUDGET / EPP REMOVE

- BUDG RMV - LAST NAME, FIRST NAME PHSS# - CUST RQST - ADVSD OF ACTL ACCT BALANCE
- BUDG RMV - LAST NAME, FIRST NAME - 2 MISSED PMTS

NOTE FORMAT - CREATE

CARE = CALIFORNIA ALTERNATE RATE FOR ENERGY

- CARE - LAST NAME, FIRST NAME PHSS# - SENT APP VIA (USPS, FAX, SCAN, EMAIL)
- CARE - LAST NAME, FIRST NAME - RCVD APP - SCANNED - IN BOX
- CARE USAGE 4-6X - LAST NAME, FIRST NAME SNT DOC VIA (USPS, FAX, SCAN, EMAIL)
- CARE USAGE 6X - LAST NAME, FIRST NAME SNT DOC VIA (USPS, FAX, SCAN, EMAIL)
- CARE AUDIT - LAST NAME, FIRST NAME SNT DOC VIA (USPS, FAX, SCAN, EMAIL) (RANDOM AUDIT PROCESS - REQUIRES PROOF OF INCOME)
- CARE RECERT - LAST NAME, FIRST NAME PER APP (SELF CERT / 2YR RECERT NO PROOF OF INCOME) - POST CARD
- CARE INFO - LAST NAME, FIRST NAME - LMVM ADVISD CUST TO CALL CX - LOC # XXXXXXXX NON PRIM - NOT ELIGIBLE - ADVS CARE ADMIN.
- CARE PEV - LAST NAME, FIRST NAME - PEV NOTICE SENT (PEV = Post Enrollment Verification)

C/RE = CANCEL / REBILL

- C/RE - LAST NAME, FIRST NAME - SENT TO BILLING FOR CORRECTION - SEE SERVICE ORDER

CBRF = CREDIT BALANCE REFUND

- CBRF - LAST NAME, FIRST NAME PHSS# - HAS NOT RCVD CHK - SENT TO BILLING - SEE SERVICE ORDER
- CBRF - LAST NAME, FIRST NAME PHSS# - SENT TO BILLING - SEE SERVICE ORDER
- CBRF - LAST NAME, FIRST NAME PHSS# - MISPLACED RFND CHK - SENT TO BILLING - SEE SERVICE ORDER

CCPA - CALIFORNIA CONSUMER PRIVACY ACT

- CCPA - LAST NAME, FIRST NAME PHSS# - SNT LTR # X VIA USPS, EMAIL, FAX
- CCPA - LAST NAME, FIRST NAME PHSS# - RCVD RQST - RMVD (i.e.EFT, EMAIL, DATE OF BIRTH)
- CCPA - LAST NAME, FIRST NAME PHSS# - SUBMTD SVC HUB TICKET FOR 3RD

CIER/COER = CUT IN ERROR / CUT OUT IN ERROR

- CIER/COER - LAST NAME, FIRST NAME PHSS# S/B ACTIVE @ LOC # XXXXXX A/O MMDDYY - CUST # XXXXXXXX SHOULD BE ACTIVE HERE - SEE SERVICE ORDER
- CIER/COER - LAST NAME, FIRST NAME PHSS# S/B ACTIVE HERE - LMVM FOR LAST NAME, FIRST NAME - TO CALL OFC ND 2 KNOW WHAT LOCATION THEY SHOULD BE AT. SEE SERVICE ORDER

CILR = CUT IN AS OF LAST READ

- CILR - LAST NAME, FIRST NAME PHD - FORGET TO CALL TO ESTB SVC IN THEIR NAME
- CILR - LAST NAME, FIRST NAME PHD - LAST NAME, FIRST NAME DECEASED
- CILR - LAST NAME, FIRST NAME PHSS# - REMOVE XXXXXX - DIVORCE/SEPARATION - XXXX AGREED

COVID - COVID 19 - DONATIONS

- COVID - LAST NAME, FIRST NAME PHSS# - \$XXXX CR - EXPLANATION

NOTE FORMAT - CREATE

CRED = CREDIT RELATED SITUATIONS

- CRED - LAST NAME, FIRST NAME PHSS# QUOTED \$ XXX TO STOP DNP XFR 2 BM - WLCL BL W/CONF # TO ESTB SPA
- CRED - LAST NAME, FIRST NAME PHSS# QUOTED \$ XXX TO STOP DNP - WLPY OFC TODAY
- CRED - LAST NAME, FIRST NAME PHSS# QUOTED \$ XXX FOR RECON XFR 2 BM - WLCL BK W/CONF # TO ESTB SPA
- CRED - LAST NAME, FIRST NAME PHSS# QUOTED \$ XXX FOR RECON WLPY OFC TODAY & TO ESTB SPA

DEP = DEPOSIT

- DEP - LAST NAME, FIRST NAME RCVD LOC - SENT TO BILLING - SEE SERVICE ORDER
- DEP - LAST NAME, FIRST NAME PHSS# - INQRD ABOUT DEP RFND - 12 MO. SATIS. CREDIT - SENT TO BILLING - SEE SERVICE ORDER
- DEP - LAST NAME, FIRST NAME RVSD - RCVD EFT APP
- DEP - LAST NAME, FIRST NAME PHSS# - QUOTED \$ XXXX IF SVCS WERE TO BE DNP'D
- DEP - LAST NAME, FIRST NAME PHSS# REVERSE - GD SCOR - SENT TO BILLING - SEE SERVICE ORDER
- DEP - LAST NAME, FIRST NAME - BILLED \$ XXXX - EFT FAILED 2X

EFT = ELECTRONIC FUND TRANSFER

- EFT - LAST NAME, FIRST NAME PHSS# - SNT APP VIA (USPS, FAX, SCAN, EMAIL)
- EFT - LAST NAME, FIRST NAME - RCVD APP - SCANNED - IN BOX
- EFT - LAST NAME, FIRST NAME - CUST RQST - APP O/F
- EFT - LAST NAME, FIRST NAME - RVSD DEP - EFT APP O/F
- EFT - LAST NAME, FIRST NAME PHSS# - RQST TO TRANSFER TO NEW LOCATION # XXXXX - SENT TO BILING - SEE SERVICE ORDER

EFT RE-ESTB = ELECTRONIC FUND TRANSFER (RE-ESTABLISH)

- EFT RE-ESTB - LAST NAME, FIRST NAME PHSS# - CUST RQST - RESOLVED ISSUES W/BANK - ACCT# XXXX

EFT RMV = ELECTRONIC FUND TRANSFER (REMOVE)

- EFT RMV - LAST NAME, FIRST NAME PHSS# - RQST TO STOP EFT - TROUBLES W/BANK ACCT - ACCT #XXXX
- EFT RMV - LAST NAME, FIRST NAME - FAILED 2X - ACCT #XXXX

EFT SUSP = ELECTRONIC FUND TRANSFER (SUSPEND)

- EFT SUSP- LAST NAME, FIRST NAME PHSS# - CUST RQST - TROUBLES W/BANK ACCT - ACCT# XXXX

GRNX = GREEN CROSS

- GRNX - LAST NAME, FIRST NAME - SENT DOCS VIA (USPS, FAX, SCAN, EMAIL)
- GRNX - LAST NAME, FIRST NAME - SCANNED - IN BOX
- GRNX - LAST NAME, FIRST NAME - (MEDICAL EQUIPMENT(s))i.e; O2 CONCENTRATOR - CALC = 9.2 = M or CALC = 18.1 = MM
- GRNX - LOC # XXXXXX LAST NAME, FIRST NAME - (MEDICAL EQUIPMENT(s))i.e; O2 CONCENTRATOR - CALC = 9.2 = M OR CALC = 18.1 = MM

NOTE FORMAT - CREATE

GRNX OTRCH - GREEN CROSS OUTREACH

Successful:

- GRNX OTRCH – LAST NAME, FIRST NAME – PHSS# - UPDATED CONTACT INFORMATION FROM XXXXXXXXXX.
Did not answer – left voicemail message
- GRNX OTRCH – LAST NAME, FIRST NAME – DNA - LMVM
Spoke with someone - Bill to Customer not available - Left verbal message to call back
- GRNX OTRCH – LAST NAME, FIRST NAME – NA – LVBMSG 2 CLBK.

HLMK = HALLMARK CARE CARD

- HLMK - LAST NAME, FIRST NAME - TYPE - CARD SENT

INFO = INFORMATION

- INFO - LAST NAME, FIRST NAME PHSS# - ADVISED MUST PAY \$\$\$ TO ESTB SVC @ LOC # XXXXXX - XFRD TO BM - WLCL BK W/CONF #
- INFO - LAST NAME, FIRST NAME PHSS# - ADVISED MUST PAY \$\$\$ TO ESTB SVC @ LOC # XXXXXX - CUST TO PAY OFFICE
- INFO - LAST NAME, FIRST NAME PHSS# - ADVISED MUST PAY \$\$\$ TO ESTB SVC @ LOC # XXXXXX - CUST TO MAIL PYMT TO NLT/SLT

MACH = MAILING ADDRESS CHANGE

- MACH - LAST NAME, FIRST NAME PHSS# FROM (PREVIOUS ADDRESS) CUST RQSTD

MULTI = MULTI CUSTOMER

- MULTI - LAST NAME, FIRST NAME PHSS# ADDED PER CUST RQST - OK W/LAST NAME, FIRST NAME PHSS#

MULTI RMV = MULTI CUSTOMER REMOVED

- MULTI RMV - LAST NAME, FIRST NAME PHSS# - CUST RQST - NO LONGER LIVING HERE

MTRA - METER ACCESS

- MTRA - LAST NAME, FIRST NAME - ACCESS REASON (I.E. MTR BLOCKED W/WOOD) - SNT LTR #1, #2 OR #3 etc. - DELIVERY METHOD (USPS)

NET = NET METER

- NET - LAST NAME, FIRST NAME - CONTRACT ON FILE
- NET MTR INSTL - LAST NAME, FIRST NAME - INSTALLED MTR # XXXXXXXX READ = XXXXX
- NET MTR RMVD - LAST NAME, FIRST NAME - REMOVED MTR # XXXXXXXX READ = XXXXX REASON IF APPLICABLE
- NET MTR EXCH - LAST NAME, FIRST NAME - RE# XXXXXXXX RD = XXXXX - IN# XXXXXXXX RD = XXXXX - REASON IF APPLICABLE
- NET MTR SURP - LAST NAME, FIRST NAME - ACCUM XXXXX KWH X RATE = \$\$\$\$\$ - RESET ACCUMULATED

NOTE FORMAT - CREATE

NSF = NON SUFFICIENT FUNDS

- NSF - 1ST OFFENSE - LAST NAME, FIRST NAME
- NSF - 2ND OFFENSE - LAST NAME, FIRST NAME - CODED NO CHECKS
- NSF - 3RD OFFENSE - LAST NAME, FIRST NAME -

PYMT = PAYMENT

- PYMT - LAST NAME, FIRST NAME PHSS# CONF# XXXXXXXX
- PYMT - LAST NAME, FIRST NAME PHSS# CLMS PYMT OF \$ XXXX NOT CREDITED FOR. SENT TO BILLING - SEE SERVICE ORDER
- PYMT - LAST NAME, FIRST NAME PHSS# PYMT OF \$ XXXX BELONGS TO LOC# XXXX - SENT TO BILLING - SEE SERVICE ORDER

RATE = RATE CHANGE

- RATE - LAST NAME, FIRST NAME PHSS# FROM XXX PER MACH
- RATE - LAST NAME, FIRST NAME FROM XXX RCVD B/L DEC
- RATE - LAST NAME, FIRST NAME PHSS# FROM XXX PER CUST - HAS ALWAYS BEEN PRIM RES - SNT TO BILLING - SEE S/O (SERVICE ORDER)

RECON = RECONNECT

- RECON - LAST NAME, FIRST NAME PHSS# QUOTED \$ XXXXX FOR RECONNECT - XFRD TO BM
- RECON - LAST NAME, FIRST NAME PHSS# - PAID \$ XXXXXX CONF# XXXXXX - DEP \$\$\$

RETURN MAIL

RTM + (USPS CODE) = RETURN MAIL + REASON CODE

RTS - Return to Sender

NDAA - Not Deliverable as Addressed

NMR - No Mail Receptacle

UTF - Unable to Forward

IA - Insufficient Address

UC - Unclaimed

NSN - No Such Number

NSS - No Such Street

BC - Box Closed

- RTM + CODE - LAST NAME, FIRST NAME LMVM PER USPS
- RTM + CODE - LAST NAME, FIRST NAME PHSS# FROM (PREV ADDRESS) CUST RQSTD
- RATE RTM - LAST NAME, FIRST NAME FROM (PREV RATE) TO (CURRENT RATE) PER MACH
- B/L DEC RTM - LAST NAME, FIRST NAME SENT VIA (USPS, FAX, EMAIL) PER MACH

RFND CHK - RTM = REFUND CHECK - RETURN MAIL

- RFND CHK - RTM -LAST NAME, FIRST NAME - STATE STATUS OF CHECK

MACH RTM W/FORWARDING ADDRESS = MAILING ADDRESS CHANGE - RETURN MAIL WITH FORWARDING ADDRESS

- MACH RTM - LAST NAME, FIRST NAME FROM (PREVIOUS ADDRESS) PER USPS

NOTE FORMAT - CREATE

SPA = SPECIAL PAYMENT ARRANGEMENT

- SPA - LAST NAME, FIRST NAME PHSS# - PAID \$\$\$\$ CONF# XXXXXX - SENT LTR VIA USPS, EMAIL, FAX

SPA CNCL = SPECIAL PAYMENT ARRANGEMENT CANCEL

- SPA CNCL - LAST NAME, FIRST NAME PHSS# - CUST RQST - NOT ABLE TO COMMIT ON REMAINING PAYMENTS -

STO = STANDING ORDER

- STO - LOCATION # - LAST NAME, FIRST NAME ESTB STO - FORM O/F

STO DNP LTR = STANDING ORDER DISCONNECT FOR NON PAYMENT LETTER SENT

- STO DNP LTR - LOC# XXXXXX - LAST NAME, FIRST NAME (STO NAME) SNT LTR VIA USPS

STO RMVD = STANDING ORDER REMOVED

- STO RMVD - LOCATION # - LAST NAME, FIRST NAME RCVD CNCL STO O/F - HOUSE / PROPERTY SOLD
- STO RMVD - LOCATION # - LAST NAME, FIRST NAME PER LAST NAME, FIRST NAME PHSS# - NEW OWNER

THFT = THEFT / FRAUD

- THFT - LAST NAME, FIRST NAME PHSS# - CLMS ACCT WAS NOT AUTHORIZED - REFERED CUST TO FTC WEBSITE
- THFT - LAST NAME, FIRST NAME PHSS# - RCVD CLMS - SENT TO BILLING - SEE SERVICE ORDER

W/O = WRITE OFF

- W/O - LAST NAME, FIRST NAME PHSS# - WANTED TO ESTB SVC @ LOC # XXXXXX ADVISED MUST PAY \$\$\$ - CUST TO PAY I/O
- W/O - LAST NAME, FIRST NAME PHSS# - WANTED TO ESTB SVC @ LOC # XXXXXX ADVISED MUST PAY \$\$\$ - CUST TO MAIL PYMT TO SLT / NLT
- W/O - LAST NAME, FIRST NAME PHSS# - WANTED TO ESTB SVC @ LOC # XXXXXX ADVISED MUST PAY \$\$\$ - XFRD TO B & P
- W/O - LAST NAME, FIRST NAME - SENT LTR TO B & P TO CLOSE FILE
- W/O - LAST NAME, FIRST NAME - SENT LTR TO CUSTOMER - NOTIFIED B & P TO CLOSE FILE

ZERO = ZERO ESTIMATE

- ZERO - LOC# XXXXXX - LAST NAME, FIRST NAME PHSS# - SNT APP VIA USPS, EMAIL, FAX
- ZERO - LOC# XXXXXX - LAST NAME, FIRST NAME - APP O/F FILE

ZERO RMV - ZERO ESTIMATE REMOVED

- ZERO RMV - LOC# XXXXXX - LAST NAME, FIRST NAME - CUST REQUEST - SENT TO BILLING - SEE SERVICE ORDER



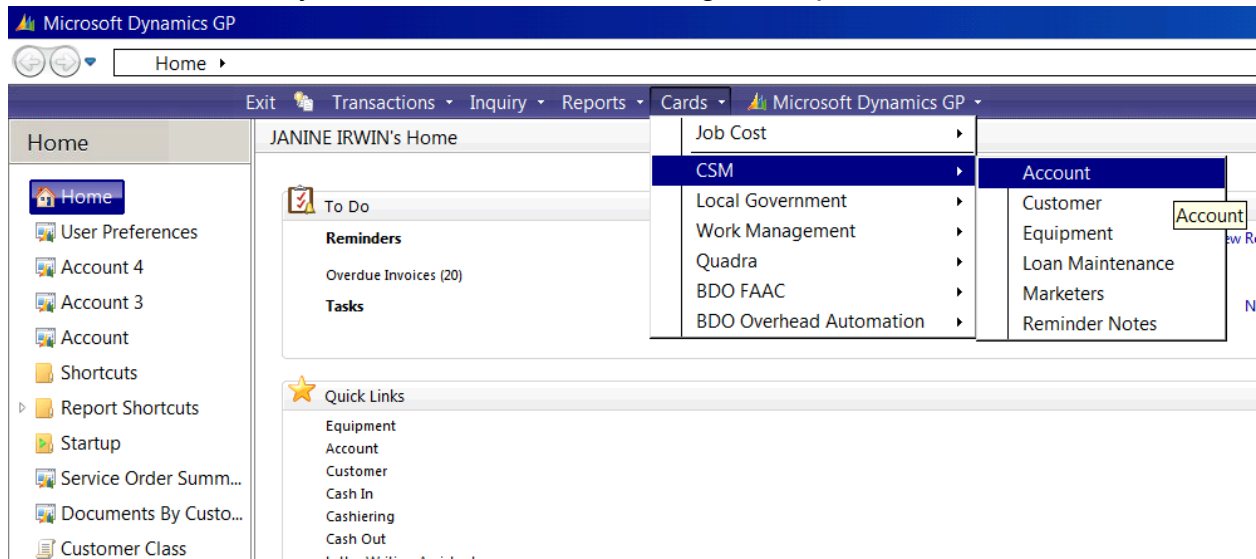
Title / Name: Move In New Customer – Read Meter

| | | | |
|-------------------------------|------------------------------|----------------------------------|---------------------------|
| GP System #: Sub-Category: | 8800 900 Work Instruction | Discipline: Sequential Doc. # | 700 Customer Care 0745 |
| State: | California | Commodity: | Electric |

Purpose: Create a Move In – Read Meter service order for a New Customer – Services are currently on in the field. Active Bill to Customer exists.

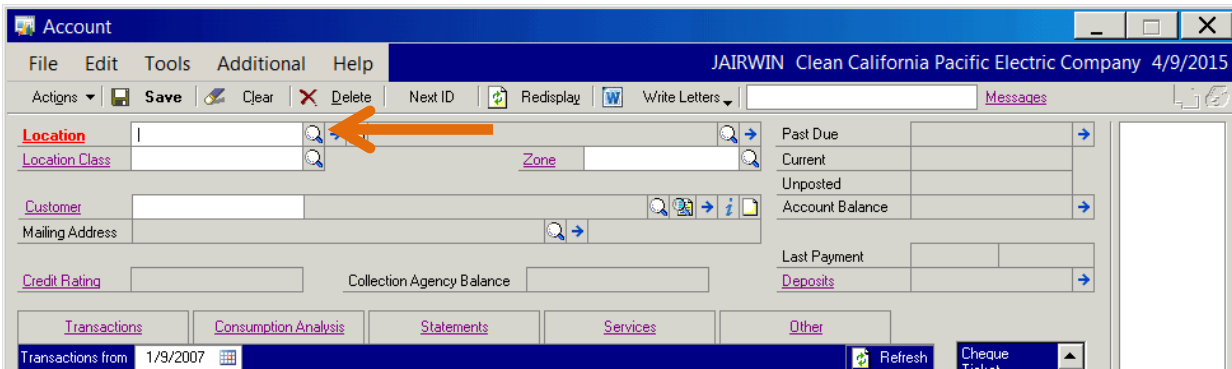
Pre-Requisite: Customer Inquiry search determined Customer has OR does not have an existing Customer Number. Services are on in the field.


1. From Microsoft Dynamics GP use the following menu path Cards > CSM > Account



2. Account screen appears

| | | | | | | |
|----------------------------|-------------------|--------------|----------------|-----------|------------------------------|--|
| Created by: | Janine Irwin-Webb | | Date Created: | 1/18/2018 | | |
| Approved by Name/Title: | | | Date Approved: | | | |
| Revision History: | Rev # 1 | Description: | Date Revised: | | Approved by (Name/Title): | |
| Revision History: | Rev # | Description: | Date Revised: | Click | Approved by: (Name/Title) | |

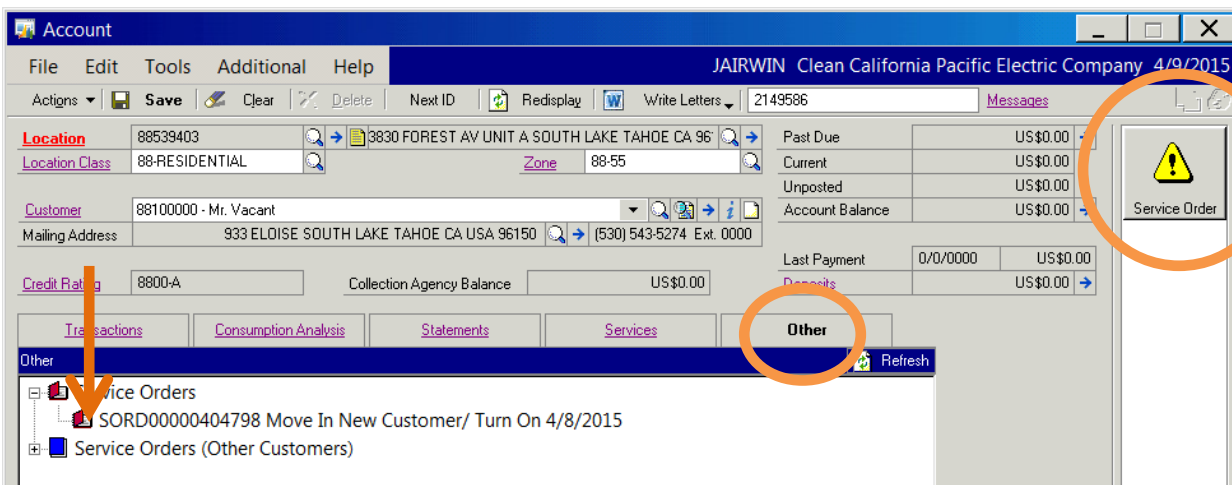


3. Enter the Location Number. Press Tab to update the screen. **NOTE:** *If you do not know the Location Number, use the Search  button*

4. Review for open pending service orders: Click on Other link

Example: Open Pending service order

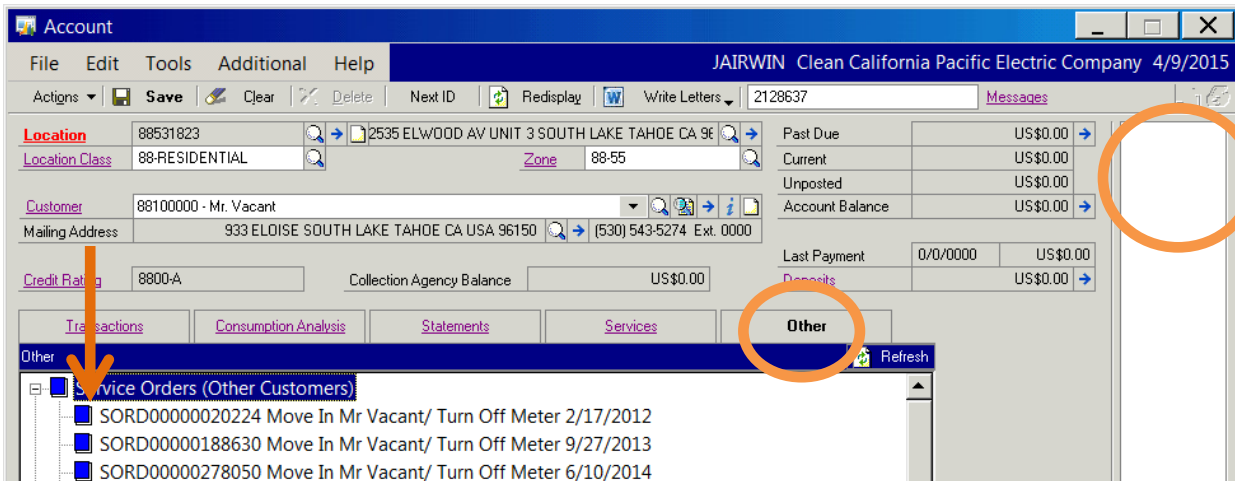
- Service Order icon appears on far right
- Via Other link Open (**Red Book**) icon displays



Example: No Open Pending service order

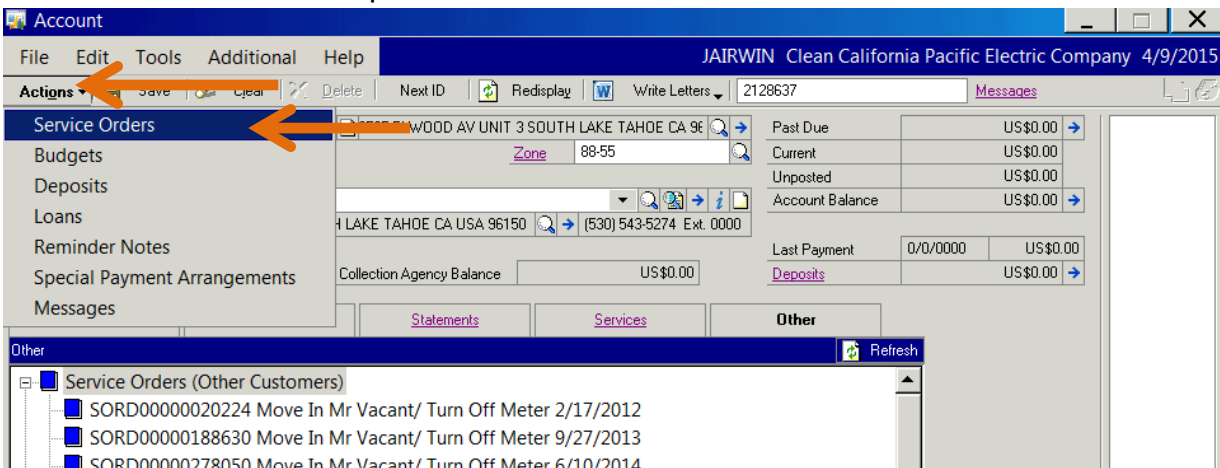
- **NO** Service Order icon appears on far right
- Via Other link **NO** Open (**Red Book**) icon displays

| | | | | | | |
|-------------------------|-------------------|--------------|----------------|-----------|---------------------------|--|
| Created by: | Janine Irwin-Webb | | Date Created: | 1/18/2018 | | |
| Approved by Name/Title: | | | Date Approved: | | | |
| Revision History: | Rev # 1 | Description: | Date Revised: | | Approved by (Name/Title): | |
| Revision History: | Rev # | Description: | Date Revised: | Click | Approved by (Name/Title): | |



5. Take appropriate actions for Open pending service order if applicable

6. Click on ACTIONS dropdown menu – Select Service Orders



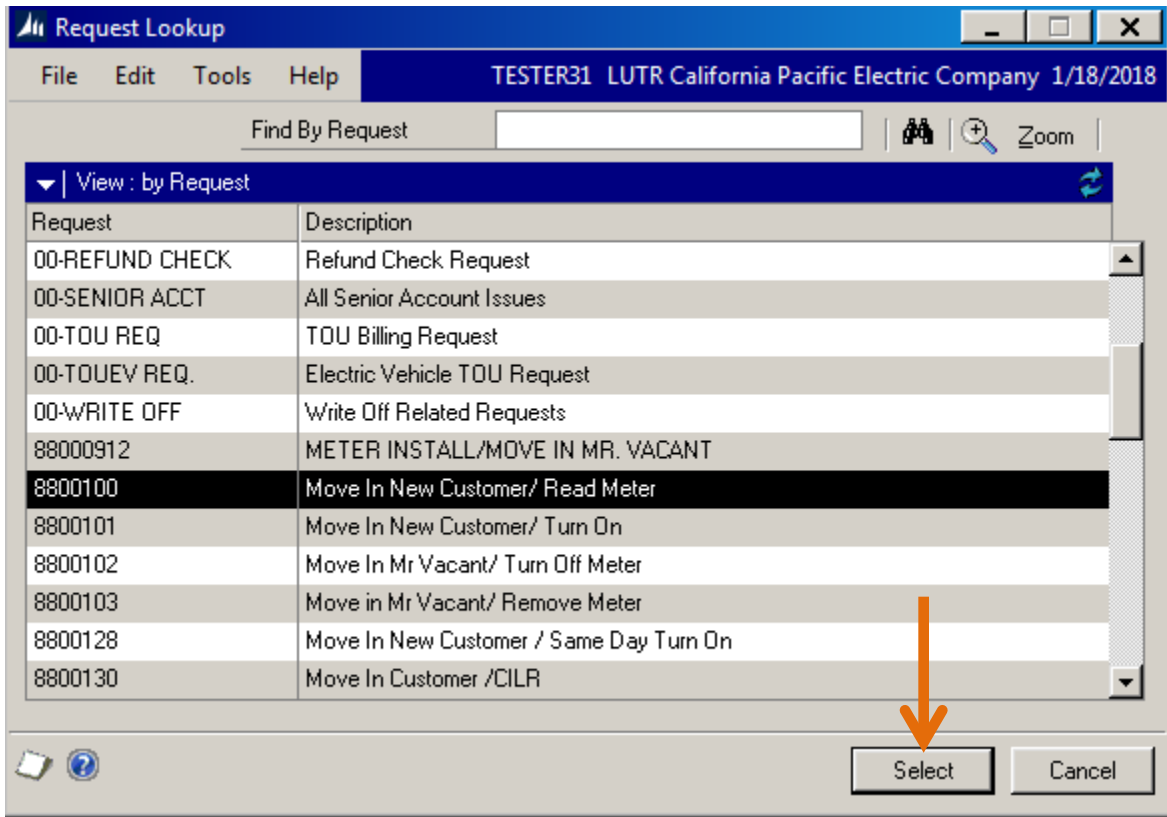
7. Service Order Entry screen appears

NOTE: You will be performing two (2) tasks here: Creating a service order, creating a new Customer record or using an existing customer number.

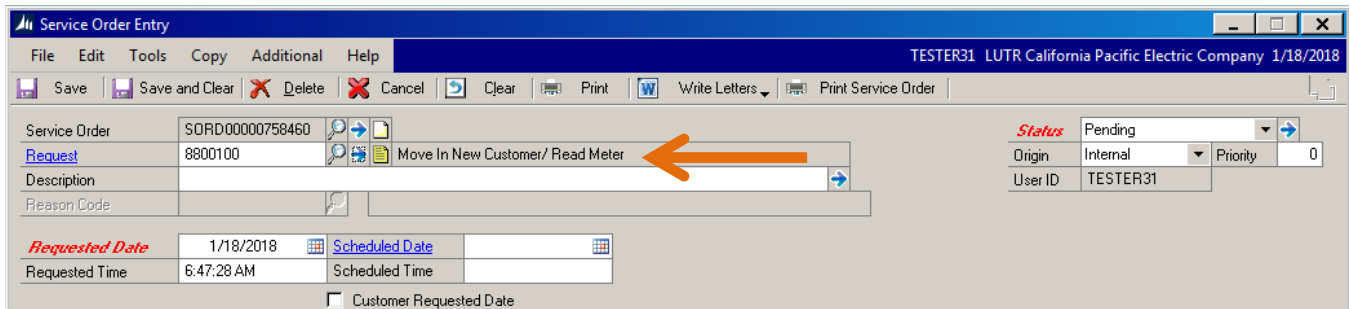
8. Click the Request search  button

9. Request Lookup screen appears

| | | | | | | |
|-------------------------|-------------------|--------------|----------------|-----------|---------------------------|--|
| Created by: | Janine Irwin-Webb | | Date Created: | 1/18/2018 | | |
| Approved by Name/Title: | | | Date Approved: | | | |
| Revision History: | Rev # 1 | Description: | Date Revised: | | Approved by (Name/Title): | |
| Revision History: | Rev # | Description: | Date Revised: | Click | Approved by: (Name/Title) | |

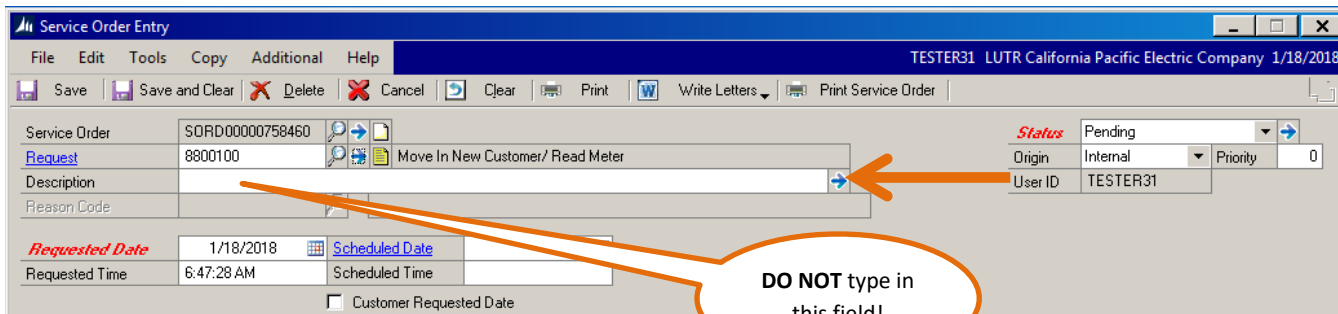


10. Select the Request Type. Click the Select button **NOTE:** Use request type 8800100 for Move In New Customer / Read Meter



11. Click the blue arrow icon at the end of the Description field

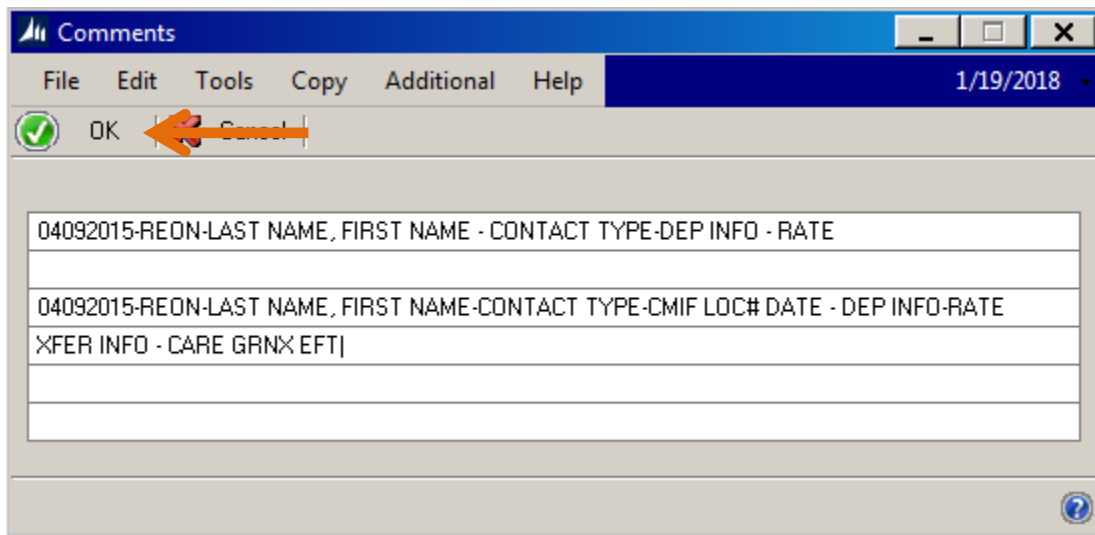
| | | | | | | |
|-------------------------|-------------------|--------------|----------------|-----------|---------------------------|--|
| Created by: | Janine Irwin-Webb | | Date Created: | 1/18/2018 | | |
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13. Comment note pad appears

14. Enter service order notes

NOTE: If the move in bill to customer is transferring services, service order note needs to state CMIF information.



15. Click OK

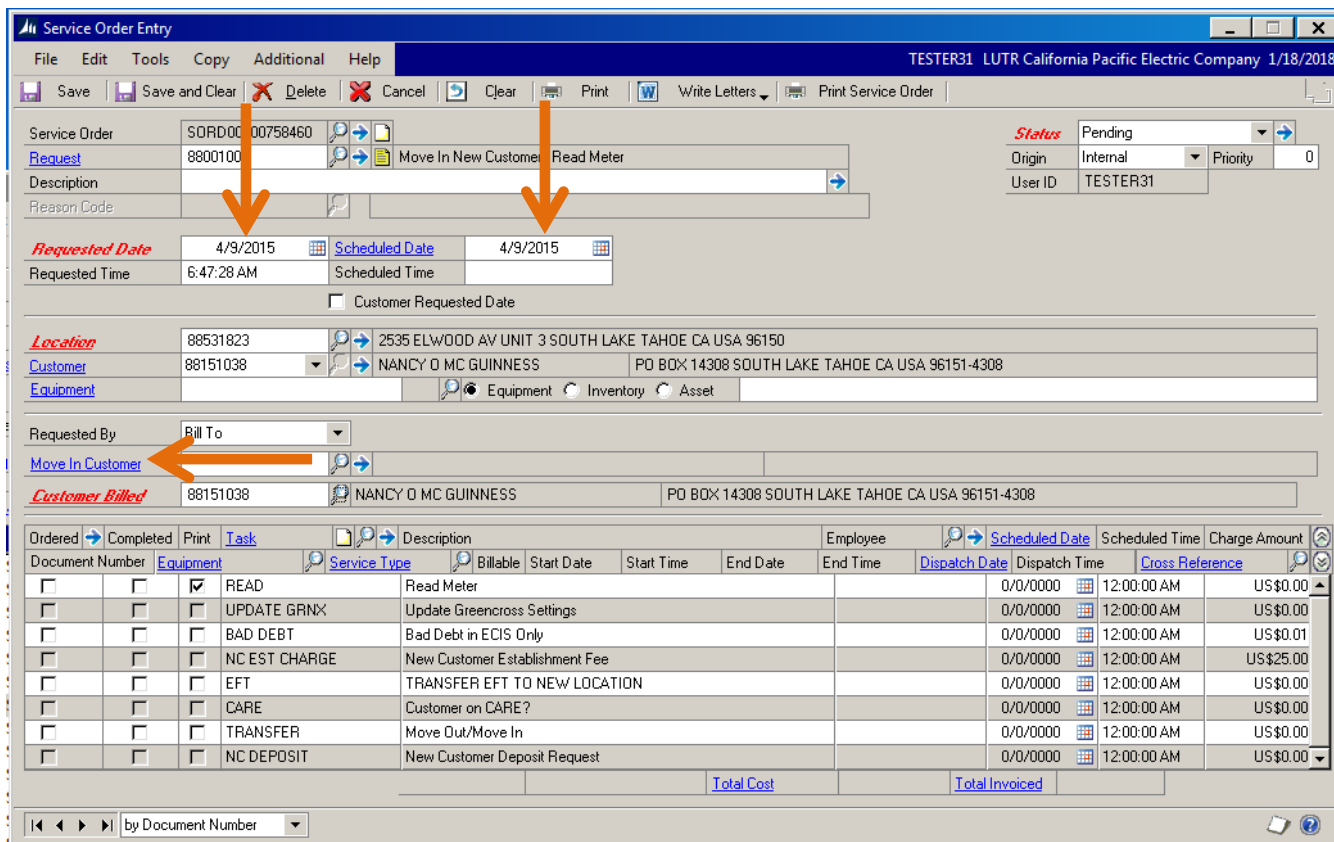
16. Service Order Entry reappears

17. Tab to "REQUESTED DATE" field. Date automatically populates with today's date

18. Tab to "SCHEDULED DATE" field. Enter date of select date from calendar icon

19. Press Tab Key

| | | | | | | |
|-------------------------|-------------------|--------------|----------------|-----------|---------------------------|--|
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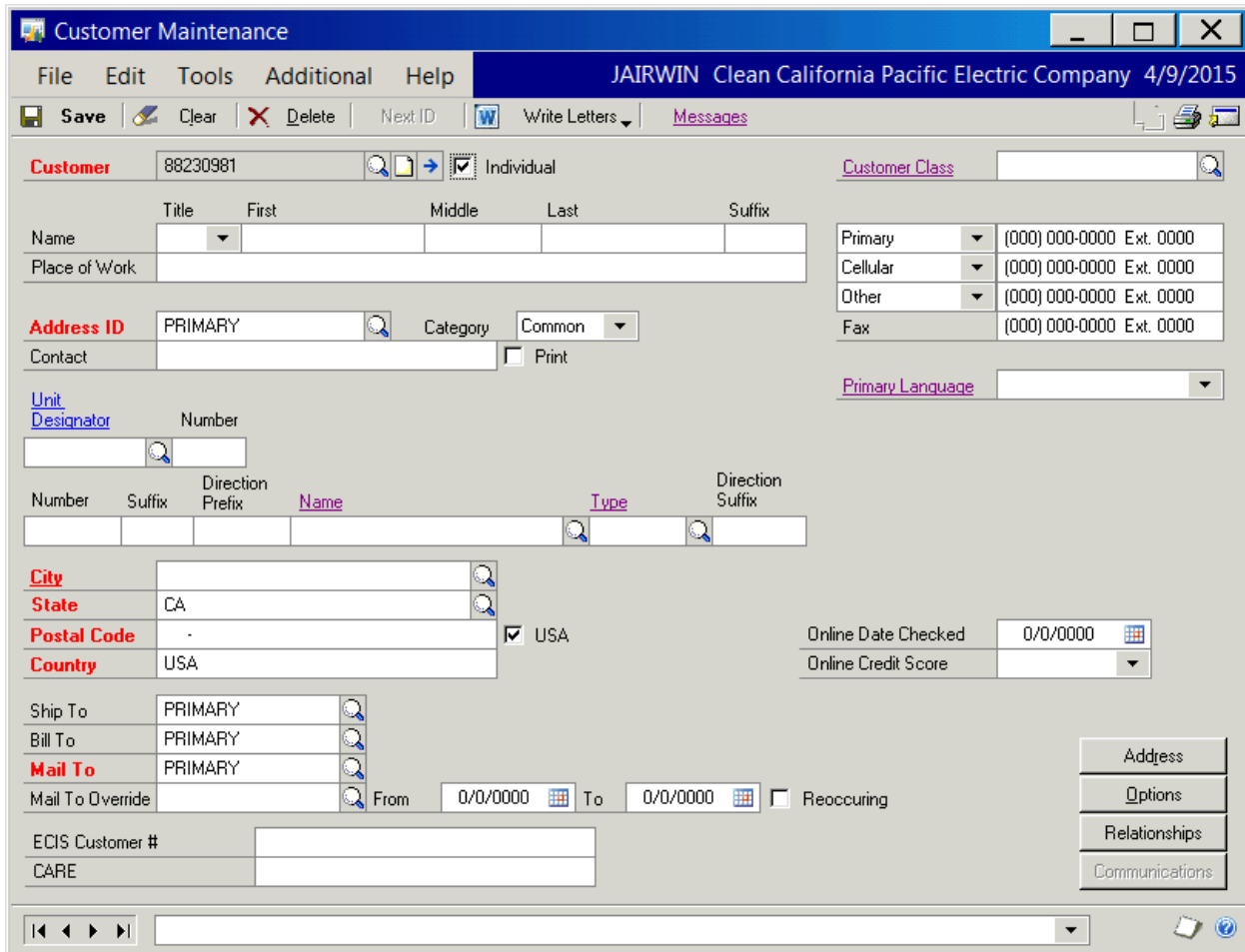


NOTE: If a Customer Number exists – Enter existing customer number in field

20. Click on Move In Customer link if a NEW customer record needs to be created

21. Customer Maintenance screen appears

| | | | | | | |
|-------------------------|-------------------|--------------|----------------|-----------|---------------------------|--|
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22. Customer field automatically populates with NEXT customer ID number

NOTE: NEXT ID button is greyed out

23. Create Customer record. Refer to New Customer – Create work instruction

24. Once completed – Service Order Entry screen reappears

NOTE: Move In Customer field is now populated with new customer name and mailing address

| | | | | | | |
|-------------------------|-------------------|--------------|----------------|-----------|---------------------------|--|
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| Approved by Name/Title: | | | Date Approved: | | | |
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Service Order Entry | File Edit Tools Copy Additional Help | JAIRWIN Clean California Pacific Electric Company 4/9/2015

Save Save and Clear Delete Cancel Clear Print Write Letters Print Service Order

Service Order: SORD00000405772 | Status: Pending
 Request: 8800101 | Origin: Internal | Priority: 0
 User ID: JAIRWIN

Requested Date: 4/9/2015 | Scheduled Date: 4/9/2015
 Requested Time: 12:43:42 PM | Scheduled Time: 12:00:00 AM

Location: 88531823 | 2535 ELWOOD AV UNIT 3 SOUTH LAKE TAHOE CA USA 96150
 Customer: 88100000 | Mr. Vacant | 933 ELOISE SOUTH LAKE TAHOE CA USA 96150
 Equipment: Equipment Inventory Asset

Requested By: Bill To

Move In Customer: 88280981 | MICKEY DISNEY | PO BOX 123 LOS ANGELES CA USA 12345
 Customer Billed: 88100000 | Mr. Vacant | 933 ELOISE SOUTH LAKE TAHOE CA USA 96150

| Ordered | Completed | Print | Task | Description | Employee | Scheduled Date | Scheduled Time | Charge Amount | |
|--------------------------|--------------------------|-------------------------------------|---------------|--------------------------------|----------|----------------|----------------|----------------|-----------------|
| Document Number | Equipment | Billable | Start Date | Start Time | End Date | End Time | Dispatch Date | Dispatch Time | Cross Reference |
| <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | READ | Read Meter | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | HISTORY | Move read from open to history | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | UPDATE GRNX | Update Greencross Settings | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | TURN ON | Turn On Meter | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | CARE | Customer on CARE? | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | EFT | TRANSFER EFT TO NEW LOCATION | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | BAD DEBT | Bad Debt in ECIS Only | | 0/0/0000 | 12:00:00 AM | US\$0.00 | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | NC EST CHARGE | New Customer Establishment Fee | | 0/0/0000 | 12:00:00 AM | US\$25.00 | |
| | | | | | | | Total Cost | Total Invoiced | |

Navigation: |<< < > >> by Document Number

25. Review information is correct
26. Click SAVE
27. Close out of screen (X) twice
28. Account / Other screen appears
29. Open pending (**Red Book**) service order displays
30. Click Redisplay button
31. Service Order icon appears on far right. Customer drop down menu shows pending customer name and date of service order

Results: You have successfully created a new customer record and Move In – Read Meter service order.

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|-------------------------|-------------------|--------------|----------------|-----------|---------------------------|--|
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| Revision History: | Rev # | Description: | Date Revised: | Click | Approved by (Name/Title): | |



Document Name/Title: Return Mail

| | | | |
|-------------------------------|------------------------------|----------------------------------|---------------------------|
| GP System #: Sub-Category: | 8800 900 Work Instruction | Discipline: Sequential Doc. # | 700 Customer Care 0871 |
| State: | California | Commodity: | Electric |

Purpose: To provide instructions to ensure proper handling of all returned mail.
Pre-Requisite: Customer’s billing statement or other related mail has been returned from the United Postal Service.

Designated employee for incoming mail within the contact center is responsible to document the amount of returned mail to be processed.

Senior or Foreman is to sort and deliver the return mail, including returned bills and letters.

RETURNED CHECKS

1. Returned checks will be delivered to the Billing Department to be placed in safe.
2. Billing CSR to place note on customer card

Note Format: RFND CHK – RTM – Last Name, First Name – state status of check.

RETURNED MAIL

Forwarding Address: USPS placed sticker on the item

1. CSR will review current mailing address and current rate code.
2. CSR will take the appropriate actions when applicable.
 - a. Change the current mailing address on the customer record within CSM
 - b. Change the rate code

| | | | | | | |
|----------------------------|--|--------------|-------------------|-----------|------------------------------|--|
| Created by: | Janine Irwin Webb | | Date Created: | 5/14/2018 | | |
| Approved by Name/Title: | Kate Marrone Supervisor Customer Care Frontline Kelsey Zieba Supervisor Customer Care Billing | | Date Approved: | 6/4/2018 | | |
| Revision History: | Rev # 1 | Description: | Date Revised: | Click | Approved by (Name/Title): | |
| Revision History: | Rev # | Description: | Date Revised: | Click | Approved by: (Name/Title) | |



- i. Send Declaration of Eligibility for Permanent Baseline Allowance
- 3. CSR will place note on the customer card.

Note Formats:

MACH – RTM – Last Name, First Name from (previous address) – Per USPS.

RATE – RTM – Last Name, First Name from (previous rate) to (current rate) – Per MACH.

B/L DEC – RTM – Last Name, First Name – Sent via (USPS, Fax, Email) Per MACH

NO Forwarding Address: USPS placed sticker on the item

1. CSR will search for the customer in the customer database (CSM) and place a note on the customer card that there has been returned mail.
2. CSR will call the customer using the phone number on the customer record.

IF Contact is made....

- CSR will update the mailing address on the customer record within CSM, using “Primary” as the mailing address type.

Note Format: MACH - RTM – (USPS code – see below list) Last Name, First Name from (previous address) per customer

- RTS – Return to Sender
- NDAA – Not deliverable as addressed
- NMR – No Mail Receptacle
- UTF – Unable to Forward
- IA – Insufficient Address
- UC – Unclaimed
- NSN – No Such Number
- NSS – No Such Street
- BC – Box Closed

| | | | | | | |
|-------------------------|--|--------------|----------------|-----------|---------------------------|--|
| Created by: | Janine Irwin Webb | | Date Created: | 5/14/2018 | | |
| Approved by Name/Title: | Kate Marrone Supervisor Customer Care Frontline Kelsey Zieba Supervisor Customer Care Billing | | Date Approved: | 6/4/2018 | | |
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- CSR will resend the item(s) that were returned, to the new mailing address upon customer request. Otherwise returned item(s) is to be shredded.

IF No Contact is made....

- CSR will place a detailed note on the customer card

Note Format: RTM – (USPS code – see below list) Last Name, First Name – LMVM (left message voice mail).

- RTS – Return to Sender
- NDAA – Not deliverable as addressed
- NMR – No Mail Receptacle
- UTF – Unable to Forward
- IA – Insufficient Address
- UC – Unclaimed
- NSN – No Such Number
- NSS – No Such Street
- BC – Box Closed

- CSR will place returned item(s) in shred bin.

| | | | | | | |
|-------------------------|--|--------------|----------------|-----------|---------------------------|--|
| Created by: | Janine Irwin Webb | | Date Created: | 5/14/2018 | | |
| Approved by Name/Title: | Kate Marrone Supervisor Customer Care Frontline Kelsey Zieba Supervisor Customer Care Billing | | Date Approved: | 6/4/2018 | | |
| Revision History: | Rev # 1 | Description: | Date Revised: | Click | Approved by (Name/Title): | |
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