**CHARGE Conference Call**

**February 7, 2013 at 9:30 AM**

**Call-in Number: 866-618-6746 and Access Code: 6060145**

Recap of Discussion

**17. EGS Marketing Activities (No Update)**

1. PUC adopted guidelines by order on November 4, 2010, which is available at the following link: <http://www.puc.pa.gov/pcdocs/1101235.docx>
2. Proposed rulemaking order adopted by PUC at February 10, 2011 Public Meeting; copy of entered order is attached; can be accessed on OCMO page and at the following link: <http://www.puc.pa.gov/pcdocs/1121422.doc>
3. Formal comments (filed with the Secretary of the PUC) were due on December 21, 2011 or sixty days after publication in the Pa. Bulletin, which occurred on October 22, 2011 at the following link: <http://www.pabulletin.com/secure/data/vol41/41-43/1789.html>.
4. Final Rulemaking Order adopted on October 24, 2012, which may be accessed at the following link: <http://www.puc.pa.gov/pcdocs/1196732.docx>; regulations will be effective upon publication in Pa. Bulletin.
   1. Petition for Reconsideration filed on November 8, 2012 and answers to Petition filed on November 19, 2012; all are available at the following link:

<http://www.puc.pa.gov/about_puc/consolidated_case_view.aspx?Docket=L-2010-2208332>.

* 1. ***Final approval and publication of regulations is pending.***

**45. Accelerating Supplier Switching Timeframes**

1. Tentative Order adopted on November 10, 2011 which is available at the following link: <http://www.puc.pa.gov/about_puc/consolidated_case_view.aspx?Docket=M-2011-2270442>; Comments were due 30 days after entry of order, or on December 14, 2011.
2. Final Order adopted on October 24, 2012, which may be accessed at the following link: [http://www.puc.pa.gov/pcdocs/1196717.docx](http://www.puc.state.pa.us/pcdocs/1196717.docx); order will be effective 90 days after entry of order, or on January 24, 2013; OCMO asks EDCs to provide estimated implementation dates by December 13, 2012 call.
3. EDCs’ estimated implementation dates: (More details will be provided by EDCs through normal EGS communications processes)
   1. PECO: Mid-June 2013.
   2. PPL: January 24, 2013.
   3. FE: January 27, 2013.
   4. Duquesne: January 23, 2013.

**46. Retail Markets Investigation**  (Docket No. I-2011-2237952)

1. PUC has launched statewide investigation to ensure properly functioning and workable competitive retail electricity market exists in the Commonwealth.
2. Information posted on website at: <http://www.puc.pa.gov/utility_industry/electricity/retail_markets_investigation.aspx>
3. Secretarial Letter and End State Proposal issued on September 27, 2012: [http://www.puc.pa.gov//pcdocs/1193057.docx](http://www.puc.state.pa.us//pcdocs/1193057.docx)
4. Stakeholder Call held on October 17, 2012 at 1:30 PM.
5. Tentative Order adopted on November 8, 2012; comments filed December 10, 2012, which are available at this link: [http://www.puc.pa.gov/about\_puc/consolidated\_case\_view.aspx?Docket=I-2011-2237952](http://www.puc.state.pa.us/about_puc/consolidated_case_view.aspx?Docket=I-2011-2237952); ***Commission action targeted for 2/14/13 PM***.
6. ***Consumer Education: Tri-fold mailings are being mailed; PPL’s is available at this link:*** [***http://www.puc.pa.gov/electric/pdf/RetailMI/PPL\_8x17\_tri-fold-lo-rez.pdf***](http://www.puc.state.pa.us/electric/pdf/RetailMI/PPL_8x17_tri-fold-lo-rez.pdf)
   1. PPL – Completed.
   2. Duquesne – Completed.
   3. ***PECO – Underway, with completion date of January 4, 2013.***
   4. ***FirstEnergy – Will commence mailings in January 2013.***
   5. ***UGI – Will mail after January 1, 2013.***
   6. ***Pike County Light and Power – Will mail after January 1, 2013.***
7. ***Consumer Education: Annual Commission-Endorsed Postcard; Status of 2013 mailings. Secretarial Letter issued on December 20, 2012 (link below) proposing to dispense with mailing of annual postcard in 2013 and resume with the mailing in 2014; Comments filed on January 18, 2014; Awaiting Commission order.***

[**http://www.puc.state.pa.us/pcdocs/1205348.docx**](http://www.puc.state.pa.us/pcdocs/1205348.docx)

1. ***Updates from EDCs on Retail Market Enhancement Programs in Default Service Plans***
2. ***Commission issued Secretarial Letter on January 29, 2013 on New/Moving Customer Scripts:*** [***http://www.puc.state.pa.us/pcdocs/1211101.docx***](http://www.puc.state.pa.us/pcdocs/1211101.docx)

**57A. PA Power Switch – General Upgrades**

1. Vendor has made general upgrades to website, including:
   1. Currently when consumers sort by price, identical prices are shown in alphabetical order; this will be changed to have the most recent posting shown first.
   2. A change is being made to allow consumers to display “Additional Information” for multiple offers, whereas currently they have to close each one before opening another.
   3. The color of the font will be changed to make “Additional Information” more noticeable to consumers.
2. Staff is receiving suggestions from EGSs about further enhancements to PA Power Switch, particularly focused on the recent changes, and asked that additional feedback be provided to [ra-OCMO@pa.gov](mailto:ra-OCMO@pa.gov) by August 15, 2012.
   1. Suggested changes should be aimed at improving the customer’s experience on PA Power Switch rather than to promote a particular business model.
   2. Staff will review suggestions that have been submitted and consult with vendor where necessary in preparation for discussion during August 23, 2012 CHARGE call.
3. Enhancements suggested by CHARGE participants include:
   1. Including fixed monthly fees in the calculation of monthly estimate, which currently factors in only usage and the charge per kWh.
   2. Allowing EGSs to display multiple product offerings instead of the current functionality that limits EGSs to one offer.
   3. Permitting EGSs to group by product types through the use of clickable tabs, such as Fixed Price, Variable Price, Renewable Offers, Time of Use Options and Other.
   4. Removing the “Additional Discounts” column.
   5. Giving all sortable attributes their own columns.
   6. Adding a column labeled “Product Term” to allow EGSs to specify the term in number of months.
   7. Fixing the price sorting feature that currently appears to be broken.
   8. Correcting the footnote regarding calculation of the monthly estimate, which currently states that the monthly estimate does not include introductory discounts while it appears that the calculation does include them.
   9. Including information to show which EGSs offer net metering, such as through the use of a check box on the main supplier page or a section under the shop for electricity tab that lists EGSs offering net metering.
   10. Standardizing the way renewable energy offers and associated prices are displayed*.*
4. Enhancements discussed during August 23, 2012 call; Staff provided update during November 1, 2012 and December 13, 2012 calls:
   1. Have asked vendor for an estimate to use a two-tiered approach, such as the tabbed method, to allow for both filtering and sorting of offers, which would address many of the suggestions made during the August 23 call, including those about allowing multiple product offerings
      1. ***Staff Update on February 7, 2013 Call.***
   2. Have asked vendor for an estimate to include fixed monthly fees in calculation of monthly estimate; vendor is moving ahead with this change.
   3. Have corrected problem with price sorting feature and the footnote regarding calculation of monthly estimate.
   4. Will consider net metering suggestion.
   5. Working on standardizing the way renewable offers are displayed.
5. Small Business Shopping Page
   1. Secretarial Letter was issued on Sept. 18, 2012: [http://www.puc.pa.gov/pcdocs/1191890.docx](http://www.puc.state.pa.us/pcdocs/1191890.docx)
   2. Page went live on Sept. 24, 2012
   3. EGSs are encouraged to participate – please contact Cyndi Page in Communications at [cypage@pa.gov](mailto:cypage@pa.gov).

**58. Cancellation Fees (No Update)**

1. An issue has been raised about the fact that consumers sometimes switch to EGSs and must pay cancellation fees to other EGSs under their contracts.
2. Suggestion has been made that switch be delayed to inform customer of the fee and that EDI transaction be developed to support this delay.
   1. Some participants support a delay to avoid later customer frustration.
   2. Others noted that this is contrary to the efforts that are underway to accelerate the switching process and that it is incumbent upon customers to be aware of their contract provision.
   3. Staff believes that some EDC’s current confirmation letters contain language warning customers to check contracts for possible cancellation fees.
3. Commission has added a feature to PA Power Switch to enable consumers to sort by “cancellation fee”; Secretarial Letter circulated on June 19, 2012; [http://www.puc.pa.gov/pcdocs/1181650.docx](http://www.puc.state.pa.us/pcdocs/1181650.docx)
4. Although there are no further action items arising from this issue, Staff is keeping the issue on the agenda for now so it can be monitored.

**59. Account Numbers**

1. Issue has been raised about the inability of EGSs to obtain account numbers for customers who are not on the Eligible Customer List but now wish to authorize (through LOAs) their EGSs to obtain them from EDCs; this occurs when EGSs sign customers at locations other than their homes and the customers do not have their bills or account numbers readily available.
2. LOAs have been used in the past to permit EGSs to obtain historical usage data for customers who are not on the ECL; in these cases, the EGS had the customer’s account number
3. Discussion of feasibility, as well as pros/cons, of EDCs providing account numbers to EGSs pursuant to LOAs from customers.
   1. EGSs describe issue as an impediment to shopping and an inconvenience for customers.
   2. Green Mountain has found that 40% of the customers who wish to enroll with them at events, etc. are not on the ECL (PECO and PPL service territories).
   3. PECO understands the convenience part but has concerns about potential for abuse and the technology needed to implement a solution.
   4. PPL’s opt-out rate is very low so there is no difficulty looking up account information.
   5. First Energy said that manually searching for information would be cumbersome and that automation would be necessary.
   6. OCA emphasized the need to change the LOA to make it very clear to customers that they are granting access to account information.
4. PECO provided an update on the call it hosted with interested parties to talk about the business rules and technology needed to implement a solution.
5. Call was held on August 21, 2012.
6. Green Mountain offered a detailed proposal that was discussed on the call.
7. PECO submitted a report to OCMO, which is undergoing review to determine next steps*.*
8. Under the solution proposed by Green Mountain (to obtain account numbers on a one-time basis for customers not on ECL for a sale away from home), which is described in attached document called “Process Flow Description: Customer Account Number Look-up”:
   1. EGS would obtain Letter of Authorization that authorizes EGS to obtain account number from EDC. (Residential Electricity Enrollment Form with this authorization is attached.)
   2. EGS would submit request through batch file via Secure File Transfer Protocol server.
   3. EDC would run report to retrieve account numbers.
   4. EDC would return file to EGS showing “No hit” or “Multiple” or the requested account number.
9. During the November 1, 2012 call, EDCs indicated that the prior discussions were focused on how the process would work but that no evaluation has yet been done on the technical feasibility and other factors necessary for implementation.
10. Discussion of feedback on Green Mountain Proposal.
    1. PECO discussed its feasibility report and noted that rather than building a separate platform, it would prefer to expand on its existing SUCCESS website, and raised concerns about cost recovery and other priorities, including RMI enhancements and accelerated switching. OCMO will discuss next steps with Green Mountain and PECO.
    2. PPL indicated agreement with Green Mountain’s proposal, noting the need to address some of the details.
    3. First Energy said it has had preliminary discussions about providing this information through the supplier support website, but has some concerns.
    4. Duquesne noted it is looking into it but has concerns about privacy and other items that need to be done. Also, it would prefer not to make changes to the legacy system when its new system will go live in the 2nd quarter of 2013.
11. ***Staff Update on February 7, 2013 call.***

**60**. **Default Service Reconciliation Interim Guidelines (No Update)**

1. Staff noted that the Commission adopted the Motion of Commissioner Cawley on July 19, 2012, which is available at this link: [http://www.puc.pa.gov//pcdocs/1185245.pdf](http://www.puc.state.pa.us//pcdocs/1185245.pdf).
   1. Motion notes that reconciliation riders have produced rate volatility and inaccurate price signals and have complicated shopping decisions for consumers.
   2. Motion seeks feedback from market participants on changes that the Commission should make to reconciliation riders to minimize adjustments to the PTC.
2. Order http://www.puc.pa.gov//pcdocs/1191608.doc entered on August 14, 2012: [http://www.puc.pa.gov//pcdocs/1187737.doc](http://www.puc.state.pa.us//pcdocs/1187737.doc).
3. By Secretarial Letter dated September 14, 2012, date for filing comments was extended to September 24, 2012 and reply comments were due on October 4, 2012: [http://www.puc.pa.gov//pcdocs/1191608.doc](http://www.puc.state.pa.us//pcdocs/1191608.doc)

**63. Fixed Prices – Variable Components (No Update)**

1. Staff has become aware of EGSs offering fixed prices to residential customers for a set time period, during which prices may change (without advance notice except general language in disclosure statement) due to variable components such as charges being imposed on the EGS by RTO or similar entity, EDC, governmental entity or agency, NERC or other industry reliability organization or court; Customers are subject to cancellation fees.
2. Group discussion as to whether it is appropriate to have pass-through costs as part of a fixed price offer.
   1. The point was made that this is a pass-through cost and EGSs earn no profit; it is intended to protect EGSs from price increases outside their control.
   2. It was also noted that it can be confusing to customers and some variables may be significant.
   3. Staff stressed that it is not looking to ban such offers but is concerned about the label of fixed price when there is a variable component.
3. Staff circulated a summary of issue or discussion during the November 1, 2012 call.
4. Staff invited feedback including any pros/cons or possible solutions that may have been omitted from summary. Various points were discussed to include:
   1. Advisory opinion from Office of Attorney General.
   2. Fixed means fixed.
   3. More transparency in disclosure statement.
   4. Advance notice of price changes.
   5. No cancellation fees.
   6. Pass-through costs due to regulatory changes outside EGS control.
   7. Practices in other jurisdictions.
   8. Fixed or variable or different label.
   9. Effect of any changes on long-term offers.
   10. Potential for higher risk premiums in fixed price offers.
5. ***Staff reviewing issue from legal, market and consumer perspectives.***

***65.* Generation Supply Cost Components**

1. Concerns have been raised about possible confusion among customers and suppliers regarding the treatment of certain cost components in the generation supply charge (such as solar, NITS, RMR, etc.), beginning June 1, 2013.
2. A suggestion has been made to use previously circulated matrix to collect this information from the EDCs and make it readily available such as on EDC supplier support websites.
3. ***EDCs will discuss feasibility and timeline for compiling this information during February 7, 2013 call.***

**66. Web Portal Working Group – EDEWG**

a. EDEWG has been tasked by the Commission to form a Web Portal Working Group with the goal of developing a standardized solution for the acquisition of interval usage data via a secure web-portal. Pertinent deadlines include:

1. Develop standard solution for sharing of 12 months of HIU by March 1, 2014.
2. Develop standard solution for sharing of billing quality interval data within 24-48 hours of daily meter reads by March 1, 2015.
3. Link to Order initiating the Web Portal Working Group can be found here: <http://www.puc.pa.gov/about_puc/consolidated_case_view.aspx?Docket=M-2009-2092655>. Scroll to the bottom of page, Order is link titled *‘20121009 SMI Final Order.’*
4. EDCs covered by smart meter provisions are mandated to participate. Other interested stakeholders are permitted. Any person interested in participation can submit their contact info to the following e-mail: [ra-EDEWG@pa.org](mailto:ra-EDEWG@pa.org).

**General Matters**

1. **New Issues**

* Any new issues or questions about issues previously discussed on CHARGE calls should be submitted to [ra-ocmo@pa.gov](mailto:ra-ocmo@pa.gov)

1. **Old Agendas/Recaps**

* All agendas and recaps are posted on the OCMO page of the website along with various other documents that have been distributed or relied upon during CHARGE discussions, at the following link - <http://www.puc.pa.gov/utility_industry/electricity/electric_competitive_market_oversight.aspx>

1. **CHARGE Distribution List**

* To be added to the CHARGE distribution list, please send an email to [ra-ocmo@pa.gov](mailto:ra-ocmo@pa.gov)

1. **CHARGE Contact List**

* Contact list is on website at the following link:

<http://www.puc.pa.gov/utility_industry/electricity/electric_competitive_market_oversight.aspx>

* Please send contact information or updates to [ra-ocmo@pa.gov](mailto:ra-ocmo@pa.gov)

1. **Meeting Schedule for First Six Months of 2013**

March 21, 2013, 9:30 a.m.

May 2, 2013, 9:30 a.m. ***Please note: Propose moving to May 1, 2013 at 1:30 p.m.***

June 13, 2013, 9:30 a.m.