

Pennsylvania Retail Markets Investigation
Discussion Document for New/Moving Customer Program and Related Customer Choice Education

Objective: The recommendations discussed in this document are intended to address the current structural barrier resulting from existing protocols that automatically assign customers to EDC-provided default service at the time of new service initiation and when customers transfer service from one location to another. Existing EDC enrollment protocols and related IT/EDI infrastructure have been designed around this assumption. Accordingly, this Draft Discussion Document contemplates Interim Measures and Long Term Measures to address this issue.

- I. Interim Term Measures:** The Interim Measures are programs designed to effectuate selection of an EGS as soon as practicable at the time of service initiation, when transferring service to another location and other appropriate customer contact points. While EDC IT work and changes to existing procedures may be required, the intent is that these proposals could be implemented without an overhaul of the existing enrollment infrastructure. While customers would still be served by default service for the first month, these measures introduce the EGS selection process as part of the process for initiating or transferring EDC service.
- New Service Initiation Call: When a customer contacts the EDC call center to set up a new account...
 - The EDC CSR representative instructs the customer to choose their generation service supplier
 - Messaging provided by CSR around default service and EGS service to be addressed in next phase of working group
 - CSR asks if customer has already chosen their supplier
 - If customer says yes (two options)
 - Option A: customer could be enrolled onto the selected supplier's Standard Offer, or default service, based on the customer's request (details related to the structure and process for EGS Standard Offer to be discussed in next phase of working group), or
 - Option B: CSR initiates a warm transfer to supplier's call center to process enrollment if alternative supplier has been selected
 - If customer says no
 - Option A: CSR asks if customer would like to participate in a supplier referral program where participating suppliers provide a Standard Offer (details related to the structure and process for the Standard Offer to be discussed in next phase), or
 - Option B: CSR asks if customer would like to be transferred to an EGS to discuss available options (transfer would go to a rotating list of participating suppliers)

Comment [h1]: General comments from PECO: 1) Concerned about impact on call center operations and at this point are thinking a good remedy would be to run the programs through a separate outsourced/contracted vendor similar to our Energy Efficiency programs. Still lot's of details to be resolved regarding warm transfers etc.

2) EDCs would need cost recovery for the incremental costs of the program.

3) EDCs would need sufficient time for proper and effective implemental following the final approval program.

Comment [h2]: RESA believes that messaging to the customer as part of this process should be designed to deemphasize default service as an option. OCA believes that information on default service must be presented to the customer as it is part of their statutory right in PA. The OCA believes that messaging by CSRs on either default service or EGS service should be neutral and informative only.

- Option C: CSR informs customer that customer could select an EGS from a list to be provided in the EDC welcome packet (see welcome packet discussion below)
 - It may be appropriate to develop a different welcome kit for customers that choose their supplier on the initial call so as to avoid customer confusion
 - Once developed, these processes could also be utilized at other points of customer contact such as bill inquiries and other customer service calls. Calls related to initiating payment arrangements, reporting service interruptions or downed power lines would not include customer choice or EGS selection.
- Welcome Packet: Customers initiating new EDC service would receive a list of EGS offers in the welcome packet along with instructions and an enrollment card to select their EGS
 - Welcome packet would inform customers that they can select a supplier from the list provided
 - Messaging around default service to be discussed in next phase of working group
 - The format of the list of EGS offers would be similar to www.papowerswitch and would include term, price, disclose ETFs, renewable attributes, etc. EGSs would be limited to one offer.
 - EGSs would include enrollment information such as a phone number and website, and would be able to update their offer information once per month
 - Packet would also include a pre-paid enrollment return card (The EDC could collect and process the cards or this could be contracted to a third party clearinghouse).
- Moving Customers: When a customer contacts the EDC in order to transfer service to a new location, the process would vary depending on the customer's current EGS selection (This assumes that current EDC systems do not allow for seamless moves.)
 - If the customer is currently served by an EGS, the EDC would notify the customer that they will receive service provided by the EDC for one billing cycle but will automatically take steps to ensure that they are reenrolled with the EDC after the transfer of service is effectuated. The EDC would compile reports of existing EGS customers who are transferring service and would provide these to the EGS of record on a frequent basis so the EGS can initiate a new 814 enrollment for the new account number after the service transfer is effective. Opportunities to ensure seamless moves to be discussed as part of long-term objectives.
 - If the customer is currently receiving default service, the EDC would follow the process outlined above for new service initiations.
- Customer Account Attribute Changes (i.e. changes that yield creation of new account number and automatic drop back to default service)

Comment [h3]: Logistics around the welcome packet process should be reviewed. PECO currently prints packets once per year. Including an insert with supplier offers would require packets to be updated monthly.

Comment [tm4]: RESA believes that messaging to the customer as part of this process should be designed to deemphasize default service as an option. OCA believes that information on default service must be presented to the customer as it is part of their statutory right in PA. The OCA believes that messaging should be neutral and informative only.

- Consider the following (based on ComEd process):
 - EDC CSR scripts updated to inform customers requesting a tax ID or other attribute change that such change will result in a reversion to default service and that customer should contact their EGS
 - EDI transaction developed to include reason code explaining that pending drop is due to attribute change (tax id change, etc.)
 - Supplier notified via this transaction and then has specified period of time to submit a special authorization form to EDC to maintain uninterrupted service (supplier identifies the existing account number on this form)
 - EDC processes form and back-dates enrollment to effectively assign customer's new account numbers to customer's chosen EGS
- Standardized Product
 - In order to conveniently facilitate EGS selection on the service initiation call with an EDC's call center, it may be necessary to require EGSs to develop a standardized product that EDC CSRs could easily describe to customers. Several approaches to the standardized product are under discussion. This program would allow customers to choose a new supplier by name or elect to be randomly assigned to a new supplier. All participating suppliers would agree to provide service for this Standard Product at the same rate, terms and conditions. EGSs would provide notice to the customer of the price, terms and conditions for renewal service.

Comment [h5]: Sub-group participants agree that if EDC CSRs are used to explain a service initiation Standard Product to customers, the price, terms and conditions should be uniform for participating suppliers so EDC CSRs can explain it easily without having to discuss multiple EGS offers.

II. Long Term Measures

- As a long term objective, as EDC enrollment protocols and EDI infrastructure can be updated, the processes discussed above would be modified to allow EGS enrollment to become effective immediately upon service initiation without a one month lag on default service.
- Categories of Issues to be addressed by New/Mover Workgroup (including, but not limited to):
 - Defining types of enrollments; defining processes for different types of enrollments
 - Defining new enrollment process and confirmation process for new/moving customers, how should the process differ between new/moving enrollments and standard switches from one EGS to another
 - Identifying new construction/permitting requirements and associated timelines
 - Defining a process for verifying accuracy of customer information/processing requests
- Proposed Process Timeline
 - February 2012: Establish work group to develop proposal for new/mover enrollment with supplier on day 1 of service
 - August 2012: Report/Recommendations/transition Plan of the Work Group due
 - October 2012: Order from PUC

- December 2012: Begin implementation phase – reprogramming of utility/supplier systems to accommodate new/mover day 1 supplier service selection
- July 2013: New/Movers able to select supplier service on day 1 of service.

