**CHARGE Conference Call**

**April 19, 2012 – 9:30 a.m.**

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

**Recap of Discussion**

**17. EGS Marketing Activities**

* PUC adopted guidelines on November 4, 2010, which is available at the following link: <http://www.puc.state.pa.us/general/ConsolidatedCaseView.aspx?Docket=M-2010-2185981>
* 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.state.pa.us/general/ConsolidatedCaseView.aspx?Docket=L-2010-2208332>
* 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>
* ***Staff is reviewing comments and will provide a target Public Meeting date the next CHARGE call***

**31. Eligible Customer List**

* Errata sheet (non-substantive corrections) and Corrected Final Order entered on November 28 and December 13, 2011
* Appellate period expired on December 14, 2011; not aware of any appeals having been filed as of this time
* Clarification – Field #18 Tax Exempt Status
  + The following clarifications were provided by EDEWG representative:
    - Item #18 – Tax Exempt Status (Y/N)
      * Y = There is some level of tax obligation on the account
      * N = There is no sales tax obligation on the account
    - Expect N for most residential accounts and Y for most commercial accounts
    - Tax exemption certificates are not required for residential customers
    - Any level of tax, e.g. commercial account at 50% exempt, would appear as ‘Y’
    - ECL is monthly snapshot of the EDC system so recent changes may not be reflected
    - EGS responsibility to confirm customers’ tax obligations
  + *A question was raised as to whether a third indicator can be provided to show a partial tax obligation*
    - ***EDEWG discussed on April 5, 2012 call and concluded that a third field did not seem to add value and that it is best to continue with only two indicators and have a partial obligation fall under the Yes category***

**44. Net Metering Customers/EDI Change Control #85**

* Questions have been raised by customers who have net metering arrangements with EDCs and then switched to EGSs without entering into net metering contracts with the EGSs; staff noted the need for customers to make these arrangements with EGSs before they switch
  + Staff has encouraged EDCs to educate customers at the time they sign a net metering contract and during the enrollment process (i.e. confirmation letter)
  + Staff has encouraged EGSs to also ensure that customers are aware before they switch that if they are on a net metering tariff, they will no longer receive energy credits from the EDC; it is up to EGSs if they want to offer energy credits to the customer
* EDEWG Update: EDI Control Change #85 would add special meter configuration segment to the EDI 814 Enrollment, Change, Reinstatement and EDI 867 Historical Usage and Historical Interval Usage transaction sets
  + Consensus not achieved in EDEWG; issue referred to CHARGE (summary attached)
  + EGSs are supportive of change; EDCs generally do not object to change but point to time and resources needed to implement; Duquesne plans to automate process in the first quarter of 2013; Duquesne and PPL currently send spreadsheets to EGSs with this information
* Discussion of any EDC plans to include this information on ECL
  + PPL plans to include it after the first of the year (2012); Duquesne has submitted request to compliance team; First Energy does not have confirmation of moving forward but does not anticipate problems; and PECO has submitted a request to team to include net metering indicator on ECL
* Staff proposed on July 21 that CHARGE seek Commission approval of EDI Control Change #85 and that EDCs implement this change within 12 months after Commission approval unless an EDC already has plans to make system-wide changes at a later time that would incorporate these changes
  + No objections were raised to this proposal
* Commission adopted Tentative Order on January 12, 2012; Comments due on February 13, 2012; TO tentatively approves EDI Change Control #85 to include indicator of customers who have net metering arrangements with the EDC

<http://www.puc.state.pa.us//pcdocs/1161690.doc>

* ***Staff will provide target PM for Final Order on the next CHARGE call***

**45. Accelerating Supplier Switching Timeframes**

* Group has discussed enrollment process/supplier switching timeframes on several calls
* Issues were moved to Retail Markets Investigation and further discussions were held
* Commission adopted Tentative Order on November 10, 2011 which is available at the following link: <http://www.puc.state.pa.us/general/ConsolidatedCaseView.aspx?Docket=M-2011-2270442>; Comments were due 30 days after entry of order, or on December 14, 2011
* ***Staff will provide target PM date on the next CHARGE call***

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

* PUC has launched statewide investigation to ensure properly functioning and workable competitive retail electricity market exists in the Commonwealth
* Information posted on website at: <http://www.puc.state.pa.us/electric/Retail_Electricity_Market.aspx>
* Investigation will examine both the legislative and regulatory framework behind Pennsylvania’s retail market, including an analysis of the current default service model and whether, as currently structured, that model is hindering competition
* To be added to distribution list, please send email to [ra-RMI@pa.gov](mailto:ra-RMI@pa.gov)
* Commission order issued on July 28 outlining the issues that should be addressed by stakeholders during investigation and directing intermediate work plan to be developed by December 2011 and long range work plan to be developed in the first quarter of 2012
* PUC adopted Tentative Order on October 14 proposing guidance for EDCs to follow in filing Default Service Plans for the period to commence in June 2013; comments are due to be filed by November 3 with the PUC Secretary; PUC adopted Final Order on December 15, 2011
* PUC adopted Tentative Order on December 15, 2011 proposing Intermediate Work Plan; Comments are due to be filed with PUC Secretary on January 17, 2012; ***PUC adopted Final*** Order on March 1, 2012: <http://www.puc.state.pa.us//pcdocs/1167521.docx>
* PUC issued Secretarial Letter and Staff Discussion Document on March 2, 2012 for March 21, 2012 en banc hearing: <http://www.puc.state.pa.us/electric/pdf/RetailMI/RMI-SecLtr_Staff_Doc_EnBanc_Hearing030212.pdf>
* Universal Service Subgroup meeting on March 23, 2012 at 11 a.m. Call-in Information: 866-618-6746, Access Code: 6060145
* Post En-Banc Hearing Comments due on April 4, 2012 to [ra-rmi@pa.gov](mailto:ra-rmi@pa.gov) (Editor’s note: the March 28, 2012 for some comments was extended to April 4, 2012 prior to distribution of this recap)
* Next Steps: Tentative Order outlining Long-Range Work Plan; ***Staff will have update by next CHARGE call***
* ***Consumer Ed Update: Staff is incorporating comments from subgroup into a new version of the consumer ed plan, which will be the basis for a tentative order; Staff expects to hold another subgroup call after new plan is circulated to subgroup members***

**51. Peak Load Contribution & Network Service Peak Load Values/EDI Change Control #87**

* Add effective date of Peak Load Contribution & Network Service Peak Load values to the EDI 867 Historical Usage and Historical Interval Usage transaction sets
* EDEWG has been unable to reach consensus and is referring to CHARGE for resolution
* Change would enable EDCs to report effective dates for both current and future PLC/NSPL values; currently the non-incumbent EGS cannot receive the future values via EDI until after June 1 when it becomes current
* EGSs are supportive of change and indicate need for future values in pricing products; EDCs generally do not object to change but point to time and resources needed to implement; FirstEnergy plans to include future values on ECL; Duquesne emails future values to EGSs; PECO posts an ECL list with future values
* Staff proposed that CHARGE seek Commission approval of EDI Control Change #87 and that EDCs implement this change within 12 months after Commission approval unless an EDC already has plans to make system-wide changes at a later time that would incorporate these changes
  + No objections were raised to this proposal
* Commission adopted Tentative Order on January 12, 2012; Comments due within 30 days of January 13, 2012 (February 13, 2012); TO tentatively approves EDI Change Control #87 to include future values of PLC/NSPL, as well as effective dates for both current and future values

<http://www.puc.state.pa.us//pcdocs/1161690.doc>

* ***Staff will provide target PM date on next CHARGE call***

**54A. Splitting Accounts**

* Issue was raised about the practice of PECO and possibly other EDCs to split an account after an EGS has signed up a customer, which results in a delay in the start date after power has been procured, without any communication to customer or EGS
* PPL has a supplier transmittal form, which allows it to manually correct the start date
* A “seamless move” process would eliminate this problem, but a manual fix should be explored in the interim
* ***PECO update: This was a one-time occurrence due to the expiration of a special contract and is not part of PECO’s regular business process***

**55. PA Power Switch - ChoosePAWind**

* Commission has been approached about making a change to PA Power Switch website to include ChoosePAWind logo in the Renewable Energy column when a supplier’s product listed is 100% PA-sourced wind energy with a link to [www.ChoosePAWind.com](http://www.ChoosePAWind.com) for additional details
* In addition, the Commission has been asked to change language on bottom right corner of the homepage where the wind turbine icon appears (Ways to Save Energy) to reference ChoosePAWind and include link to website
* General discussion of pros and cons of making these changes
  + Concerns were raised about having logo displayed on main page, noting that it shows a preference for a product that is not nationally certified and that having a link for PA wind could result in numerous other requests for similar links to be added
  + Suggestion was made that such information may be placed in the “Additional Information” field under the Supplier’s name
* ***Commission is moving forward to:*** 
  + *Include “Renewable Energy” tab on home page (similar to Clean Energy tab that now appears on Ways to Save Energy page)*
  + *Include Choose PA Wind link on Clean/Renewable Energy page, along with other related links*
  + *Establish a “Click for details” in the Renewable Energy column of the shopping page (rather than a “Call for details), which would allow suppliers to include information such as Choose PA Wind logo or link*

**56. PA Power Switch – Renewable Energy Changes**

* Penn Future has worked with a group of EGSs with green products who are interested in adding information to PA Power Switch to help better inform consumers on the differences between green energy products
* During last call discussed Renewable Energy Suppliers Recommendations for PA Power Switch, including:
  + Key proposal includes addition of columns on shopping page to show “percent of renewable power” and “location of renewable power,” which raises concerns about cluttering website but would allow sortability by these criteria
  + Back-up proposal is to create a Renewable Energy Suppliers page
  + Other alternatives were mentioned such as including this information when the customer “clicks for more details” in the renewable energy column
  + Suggestion was made to include information as to whether product is certified, such as Green E, which provides for a third party audit; a downside to that suggestion is that the use of the Green E label requires payment, adding a cost to the EGS
  + It was noted that the Commission should offer guidelines as to product descriptions and/or offer only pre-populated choices, such as PJM RECs
* ***Staff update: In connection with adding a “Click for Details” to the Renewable Energy Column, where this information can be made available, the Commission is also working with vendor to add specific blocks for “percent of renewable power” and “location of renewable power,” which would be sortable by consumers***
  + *Staff asked Penn Future to provide feedback on drop down boxes for location*
  + *Staff is reviewing existing regulations concerning renewable energy to determine need for any additional guidelines*

**57. PA Power Switch – Term for Fixed-Price Product**

* While PA Power Switch allows consumers to sort by price, the consumer does not receive information as to the term for a fixed-price product in the results but must instead click on “additional information,” which makes it difficult to do an apples-to-apples comparison
* It has been suggested that a column to show the term for fixed-price products should be added (See <http://pluginillinois.org/OffersBegin.aspx> and [www.powertochoose.com](http://www.powertochoose.com)**)**
  + An alternative suggestion, to avoid adding another column, is to add text in the price column that indicates the length of the product
* ***Staff update: Commission is moving forward to have the term or expiration date for fixed price products added to the price column and to give consumers the ability to sort by the term***

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

* ***Staff provided information on general upgrades that vendor is making to the website, including:***
  + *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*
  + *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*
  + *The color of the font will be changed to make “Additional Information” more noticeable to consumers*

**58. Cancellation Fees**

* 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
* Suggestion has been made that switch be delayed to inform customer of the fee and that EDI transaction be developed to support this delay
  + Some participants support a delay to avoid later customer frustration
  + 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
  + Staff believes that some EDC’s current confirmation letters contain language warning customers to check contracts for possible cancellation fees
* Although there are no action items arising from this issue, Staff will keep the issue on the agenda for now so it can be monitored
* ***Staff update: Commission plans to add a feature to PA Power Switch to enable consumers to sort by “cancellation fee”***

**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.state.pa.us/electric/electric_CompetitiveMarketOversight.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.state.pa.us/electric/electric_CompetitiveMarketOversight.aspx>

* Please send contact information or updates to [ra-ocmo@pa.gov](mailto:ra-ocmo@pa.gov); purpose of this list is to enable stakeholders to contact one another directly to resolve issues and is separate from email distribution list

**Meeting Schedule for First Six Months of 2012**

* May 17, 2012, 9:30 a.m.
* June 14, 2012, 9:30 a.m.

***Proposed Meeting Schedule for Second Half of 2012***

* *July 26, 2012, 9:30 a.m.*
* *August 23, 2012, 9:30 a.m.*
* *October 4, 2012, 9:30 a.m.*
* *November 1, 2012, 9:30 a.m.*
* *December 13, 2012, 9:30 a.m.*