**CHARGE Conference Call**

**May 1, 2013 at 1:30 PM**

**Call-in Number: 888-330-1716 and Access Code: 6060145**

Recap of Discussion

**17. EGS Marketing Activities**

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. ***Order on Petition for Reconsideration was adopted at 4/4/13 Public Meeting and is available at the following link:*** [***http://www.puc.pa.gov//pcdocs/1222787.doc***](http://www.puc.pa.gov//pcdocs/1222787.doc)
  2. ***Final regulations will be considered by Independent Regulatory Review Commission on 5/16/13.***

**45. Accelerating Supplier Switching Timeframes (No update)**

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.
3. EDCs’ implementation dates: (More details will be provided by EDCs through normal EGS communications processes)
   1. PECO: Estimates implementation by mid-June 2013.
   2. PPL: Implemented January 25, 2013.
   3. FE: Implemented January 28, 2013.
   4. Duquesne: Implemented January 23, 2013.
4. Proposed rulemaking order will be initiated by 12/31/13 per the RMI Final Order adopted 2/14/13.

**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 11/8/12; comments filed 12/10/12; and Final Order adopted on 2/14/13, 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);
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 – Completed.
   4. FirstEnergy – Completed.
   5. UGI – Not sending mailings due to no EGSs making offers in territory.
   6. Pike County Light and Power – Completed.
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, 2013***; Commission order is targeted for 5/23/13.***

<http://www.puc.state.pa.us/pcdocs/1205348.docx>

1. Updates on Retail Market Enhancement Programs in Default Service Plans
2. PECO: Final Order adopted on 2/14/13; Opt-in program on hold; Standard offer program on track for 6/1/13.
3. PPL: Final Order adopted on 1/24/13; Opt-in program on hold; Standard offer program on track for 8/1/13.
4. FE: Final Order adopted on 2/14/13; Opt-in program on hold; Stakeholder meeting on Standard Offer Program held 3/28/13; ***Request pending to move implementation from 6/1/13 to 8/1/13***.
5. Duquesne: Final Order adopted on 1/24/13; Opt-in program on hold; Standard offer program on track for 8/1/13.
6. Commission Tentative Order on Reconsideration adopted on 3/14/13, which is available at this link: <http://www.puc.pa.gov/pcdocs/1218938.docx>; comments due 3/25/13.
7. ***Commission Final Order on Reconsideration adopted on 4/4/13, which is available at this link:*** [***http://www.puc.pa.gov/pcdocs/1222757.docx***](http://www.puc.pa.gov/pcdocs/1222757.docx).
8. Commission issued Secretarial Letter on 1/29/13 on New/Moving Customer Scripts: <http://www.puc.state.pa.us/pcdocs/1211101.docx>

***46A.* Letter of Authorization – Access to Customer Information**

1. RMI Intermediate Work Plan Order adopted 3/1/12 directed OCMO to convene stakeholders to review and revise LOA to authorize EGSs to gain access to customer information needed to initiate service and provide other services.
2. ***OCMO plans to convene stakeholders on a TBD date in May 2013 and targets 6/15/13 for issuance of a Secretarial Letter***.
3. ***Staff will be sending note out to group to establish list of interested participants.***

**46B*.* EGS Bonding/EDC Creditworthiness Requirements**

1. RMI Intermediate Work Plan Order adopted 3/1/12 directed OCMO to convene stakeholders to discuss changes to existing creditworthiness requirements and submit recommendations to Commission.
2. OCMO has received suggestions from EGSs and internal directives related to a review of existing bonding requirements in light of Pennsylvania’s laws requiring pre-payment of gross receipts tax.
3. ***OCMO has established a list of interested participants, reached out to PJM, plans to convene stakeholders on a TBD date in May 2013 and targets 7/1/2013 to provide recommendations to Commission***.

**46C. Joint Bill**

1. RMI Final Order adopted 2/14/13 directs OCMO to explore options to create more supplier-oriented utility consolidated bill and provide recommendations to Commission by 12/31/13.
2. ***Staff sent note to solicit ideas from stakeholders on 3/25/13. Feedback is due on 5/1/13 and should be sent to*** [***ra-OCMO@pa.gov***](mailto:ra-OCMO@pa.gov)***. If anyone needs a few more days, please let us know.***
3. ***Staff will review submissions, reach out to commenters with questions and contact all stakeholders by 6/1/13 with information about the next steps in the process.***

**46D.** **Procurement Collaboration Working Group**

1. *RMI Final Order adopted 2/14/13 directs OCMO develop a working group to formulate uniform yearly certification process, uniform supply master agreement, procurement methodology and timeline for quarterly auctions.*
2. *Work product must be completed by 4/1/14 for approval by Commission by 6/1/14.*
3. ***Staff is currently discussing with EDCs and will reach out next to EGSs.***

**46E.** **Alternative Default Service Model** (No Update)

1. RMI Final Order adopted 2/14/13 directs OCMO to convene stakeholders to identify issues related to model in which alternative entity or multiple entities provide default service; and offer recommendations to Commission by 11/15/13.
2. OCMO plans to develop a list of issues for circulation to stakeholders in early May 2013 and has targeted 9/1/13 for the submission of recommendations to the Commission.

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

1. 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*.*
2. Enhancements discussed during August 23, 2012 call; Staff provided update during future calls.
   1. Vendor has been selected for PAPowerSwitch and has provided quote and proposed solution to enable greater sorting and filtering. ***Staff Update: Changes are expected to be implemented by 6/30/13.***
   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. Staff Update: Including among the fields/columns/categories should be responsive.
   5. Working on standardizing the way renewable offers are displayed. ***Staff Update: Appears that standardization is not needed at this time. If any participants wish to further discuss this issue on a future CHARGE call, please notify OCMO at*** [***ra-OCMO@pa.gov***](mailto:ra-OCMO@pa.gov) ***by 6/17/13.***

**58. Cancellation Fees**

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.
5. Issue has arisen internally regarding cancellation fees that are imposed when a customer switches to a different EGS near the end of the contract term and the switch is effectuated prior to the end of the contract term.
   1. ***Based on OCMO’s preliminary discussions with stakeholders, this does not appear to be a problem.***
   2. ***EGSs seem to be using a certain number of billing cycles vs. a certain number of months or years to determine whether cancellation fees apply.***
   3. ***Stakeholders should alert OCMO by email to*** [***ra-OCMO@pa.gov***](mailto:ra-OCMO@pa.gov) ***by 6/17/13 if this is an issue that needs to be addressed.***

**59. Account Numbers Look Up Tool**

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. ***Staff Update: Tentative Order adopted on 4/18/13 PM which is available at the following link:*** [***http://www.puc.pa.gov//pcdocs/1225547.doc***](http://www.puc.pa.gov//pcdocs/1225547.doc)***; Comments are due 5/20/13.***

**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**

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 including:
   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. ***Tentative Order is targeted for 5/23/13 PM.***

***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. Completed matrix of information submitted by EDCs and reviewed by OCMO, updated to correct an error circulated with the agenda, was attached to 3/21/13 recap.
4. ***EDCs to provide responses on feasibility of posting information on a public website so that consumers may access. Responses should be provided to OCMO at*** [***ra-OCMO@pa.gov***](mailto:ra-OCMO@pa.gov) ***by 6/17/13.***

**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.gov](mailto:ra-EDEWG@pa.gov)***.***
5. On a related matter, First Energy Default Service Order entered 8/16/12 directed OCMO to prepare a report on providing EGSs with a web-based solution providing access to key usage and service information in a single place, which can provide information in a timely manner to enable real time pricing to customers.
   1. OCMO provided report to Commission on 2/15/13***.***
   2. ***Secretarial Letter adopted at 4/4/13 Public Meeting and is available at this link:*** [***http://www.puc.pa.gov//pcdocs/1222777.docx***](http://www.puc.pa.gov//pcdocs/1222777.docx)

***67.*** Net Metering Credits

* 1. OCMO has become aware of an issue in FirstEnergy’s territory regarding the way net metering customers’ usage is reported to PJM, which appears to preclude customers from getting credits.
  2. ***Update from FE: Company is making a procedural change to correct this issue; will describe change at supplier workshop in June.***

***68. OCMO-Supplier Workshop (NEW)***

1. ***OCMO is planning a Supplier Workshop on June 20, 2013, 10 a.m.-3 p.m.***
2. ***Goal of workshop is to promote business practices by EGSs that are compliant with PA law and that increase overall customer satisfaction with the retail market.***
3. ***Session will include segments on the new marketing regulations; consumer complaint handling; the sharing of best practices/lessons learned on door-to-door marketing; PAPowerSwitch.com upgrade; and updates on key CHARGE and RMI initiatives.***

**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 Remainder of 2013**

***June 20, 2013, 9:30 a.m. – CANCELLED – Electronic Update Will Be Distributed***

***August 1, 2013, 9:30 a.m.***

***September 19, 2013, 9:30 a.m.***

***November 7, 2013, 9:30 a.m.***