

COMMONWEALTH OF PENNSYLVANIA
PUBLIC UTILITY COMMISSION

JOANN ROBERTS : DOCKET NO.
: F-2024-3046011

v. :

PPL ELECTRIC UTILITIES CORPORATION :

Initial Call In Telephonic Hearing :

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Judge's Chambers
Commonwealth Keystone Building
400 North Street
Harrisburg, PA 17120

Wednesday, April 17, 2024
Commencing at 10:26 a.m.

BEFORE:

MICHAEL MROCZKA, SPECIAL AGENT

REPORTER:

TIFFANY L. MAST

APPEARANCES:

PETER J. KRAMER, ESQ.
NICHOLAS A. STOBBE, ESQ.
POST AND SCHELL, P.C.
17 North Second Street
12th Floor
Harrisburg, PA 17101
717.612.6033
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nstobbe@postschell.com

FOR: PPL ELECTRIC UTILITIES CORPORATION

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CERTIFYING AGENCY
KARASCH & ASSOCIATES (800) 621-5689

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COMPLAINANT: IDENTIFIED/ADMITTED

(None.)

RESPONDENT: IDENTIFIED/ADMITTED

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PPL ELECTRIC EXHIBIT NO. 1

Account Activity Statement

*** Account Information ***

*** Current Account Status ***

Account Number: [REDACTED]
 Mail To: JOANN ROBERTS
 [REDACTED]
 Requested By: JOANN ROBERTS
 [REDACTED]
 Extension: [REDACTED]

Payment Agreement
 Installment: \$0.00 Balance: \$0.00
 Budget Bill Amortization
 Installment: \$0.00 Balance: \$0.00
 Current Rate: RS

DATE	TRANSACTION TYPE	DUE DATE	TRANSACTION AMOUNT	BALANCE FORWARD	ACTUAL BILLED	DEFERRED BALANCE	DEG DAY H/C	RDG/TYPE	DAYS USED	KWH	BILLED KW
04/21/2020	Payment		\$-115.19								
05/04/2020	ELECTRIC SERVICE		\$115.27								
05/04/2020	Regular Bill	05/26	\$115.27				0546/0003	16474A	32	851	
05/27/2020	Payment		\$-115.27								
06/03/2020	ELECTRIC SERVICE		\$107.82								
06/03/2020	Regular Bill	06/24	\$107.82				0230/0059	17264A	30	790	
06/18/2020	Payment		\$-107.82								
07/02/2020	ELECTRIC SERVICE		\$107.29								
07/02/2020	Regular Bill	07/27	\$107.29				0015/0200	18079A	29	815	
07/21/2020	Payment		\$-107.29								
08/04/2020	ELECTRIC SERVICE		\$139.46								
08/04/2020	Regular Bill	08/25	\$139.46				0000/0420	19184A	33	1105	
08/25/2020	Payment		\$-139.46								
09/02/2020	ELECTRIC SERVICE		\$121.73								
09/02/2020	Regular Bill	09/23	\$121.73				0000/0239	20130A	29	946	
09/23/2020	Payment		\$-121.73								
10/05/2020	ELECTRIC SERVICE		\$123.82								
10/05/2020	Regular Bill	10/26	\$123.82				0150/0080	21095A	33	965	
10/28/2020	Payment		\$-123.82								
11/03/2020	ELECTRIC SERVICE		\$110.56								
11/03/2020	Regular Bill	11/24	\$110.56				0374/0004	21942A	29	847	
11/24/2020	Payment		\$-110.56								
12/03/2020	ELECTRIC SERVICE		\$138.22								
12/03/2020	Regular Bill	12/28	\$138.22				0555/0001	23037A	30	1095	
12/21/2020	Payment		\$-138.22								
01/05/2021	ELECTRIC SERVICE		\$126.95								
01/05/2021	Regular Bill	01/26	\$126.95				1050/0000	24002A	33	965	
01/15/2021	Payment		\$-126.95								
02/04/2021	ELECTRIC SERVICE		\$108.82								

DATE	TRANSACTION TYPE	DUE DATE	TRANSACTION AMOUNT	BALANCE FORWARD	ACTUAL BILLED	DEFERRED BALANCE	DEG DAY H/C	RDG/TYPE	DAYS USED	BILLED KW
02/04/2021	Regular Bill	02/25	\$108.82				1103/0000	24809A	30	807
02/18/2021	Payment		\$-108.82							
03/08/2021	ELECTRIC SERVICE		\$120.78							
03/08/2021	Regular Bill	03/29	\$120.78				1167/0000	25721A	32	912
03/18/2021	Payment		\$-120.78							
04/07/2021	ELECTRIC SERVICE		\$116.29							
04/07/2021	Regular Bill	04/28	\$116.29				0633/0000	26591A	30	870
04/20/2021	Payment		\$-116.29							
05/06/2021	ELECTRIC SERVICE		\$114.74							
05/06/2021	Regular Bill	05/27	\$114.74				0445/0001	27442A	29	851
05/13/2021	Payment		\$-114.74							
06/07/2021	ELECTRIC SERVICE		\$127.65							
06/07/2021	Regular Bill	06/28	\$127.65				0195/0098	28402A	32	960
06/22/2021	Payment		\$-127.65							
07/07/2021	ELECTRIC SERVICE		\$128.39							
07/07/2021	Regular Bill	07/28	\$128.39				0017/0220	29354A	30	952
07/22/2021	Payment		\$-128.39							
08/05/2021	ELECTRIC SERVICE		\$125.48							
08/05/2021	Regular Bill	08/26	\$125.48				0002/0197	30281A	29	927
09/01/2021	Payment		\$-125.48							
09/03/2021	ELECTRIC SERVICE		\$129.78							
09/03/2021	Regular Bill	09/27	\$129.78				0007/0270	31245A	29	964
09/16/2021	Payment		\$-129.78							
10/05/2021	ELECTRIC SERVICE		\$128.06							
10/05/2021	Regular Bill	10/26	\$128.06				0077/0075	32196A	32	951
10/22/2021	Payment		\$-128.06							
11/03/2021	ELECTRIC SERVICE		\$131.36							
11/03/2021	Regular Bill	11/24	\$131.36				0239/0009	33185A	29	989
11/24/2021	Payment		\$-131.36							
12/03/2021	ELECTRIC SERVICE		\$184.72							
12/03/2021	Regular Bill	12/28	\$184.72				0774/0000	34609A	30	1424
12/17/2021	Payment		\$-184.72							
01/05/2022	ELECTRIC SERVICE		\$191.69							
01/05/2022	Regular Bill	01/26	\$191.69				0905/0000	35911A	33	1302

DATE	TRANSACTION TYPE	DUE DATE	TRANSACTION AMOUNT	BALANCE FORWARD	ACTUAL BILLED	DEFERRED BALANCE	DEG DAY H/C	RDG/TYPE	DAYS USED	KWH	BILLED KW
02/03/2022	OnTrack Credit		\$-54.77								
02/03/2022	ELECTRIC SERVICE		\$173.77								
02/03/2022	Regular Bill	02/24	\$310.69	\$136.92			1241/0000	37127A	29	1216	
02/18/2022	Payment		\$-119.00								
03/03/2022	OTRK Arrearage Credit		\$-10.65								
03/04/2022	OnTrack Credit		\$-57.50								
03/04/2022	ELECTRIC SERVICE		\$176.50								
03/04/2022	Regular Bill	03/28	\$300.04	\$123.54			0982/0000	38364A	29	1237	
03/21/2022	Payment		\$-119.00								
03/23/2022	Returned Check		\$119.00								
03/31/2022	Payment		\$-238.00								
04/04/2022	OnTrack Credit		\$-33.03								
04/04/2022	OTRK Arrearage Credit		\$-10.65								
04/04/2022	CANCELED ELECTRIC SERVICE		\$152.03								
04/04/2022	Canceled Bill	04/25	\$181.04	\$29.01			0734/0000	39413A	31	1049	
04/08/2022	OnTrack Credit		\$-33.03								
04/08/2022	Miscellaneous		\$-119.00								
04/08/2022	Adjustment		\$-152.03								
04/08/2022	OnTrack Overpayment EXCR		\$-119.00								
04/08/2022	Debit Transfer Charge		\$33.03								
04/08/2022	Debit Transfer Payment		\$119.00								
04/08/2022	ELECTRIC SERVICE		\$152.03								
04/08/2022	Regular Bill	05/02	\$170.39	\$18.36			0734/0000	39413A	31	1049	
05/04/2022	OnTrack Credit		\$-17.16								
05/04/2022	ELECTRIC SERVICE		\$136.16								
05/04/2022	Regular Bill	05/25	\$289.39	\$153.23			0444/0002	40342A	30	929	
05/09/2022	OTRK Arrearage Credit		\$-10.65								
05/10/2022	Payment		\$-119.00								
06/02/2022	OTRK Arrearage Credit		\$-10.65								
06/03/2022	OnTrack Credit		\$-13.93								
06/03/2022	ELECTRIC SERVICE		\$132.93								
06/03/2022	Regular Bill	06/27	\$268.09	\$135.16			0086/0088	41223A	30	881	
06/17/2022	Payment		\$-119.00								
07/05/2022	OTRK Arrearage Credit		\$-10.65								
07/06/2022	OnTrack Credit		\$-61.13								
07/06/2022	ELECTRIC SERVICE		\$180.13								
07/06/2022	Regular Bill	07/27	\$257.44	\$77.31			0016/0155	42227A	32	1004	
07/18/2022	Payment		\$-119.00								
08/03/2022	OnTrack Credit		\$-38.81								

Bill Account: [REDACTED]

Account Activity Statement

Date: 04/05/24
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DATE	TRANSACTION TYPE	DUE DATE	TRANSACTION AMOUNT	BALANCE FORWARD	ACTUAL BILLED	DEFERRED BALANCE	DEG DAY H/C	RDG/TYPE	DAYS USED	KWH	BILLED KW
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12/01/2023	Payment		\$-238.00					
12/01/2023	OnTrack Credit		\$-73.35					
12/01/2023	OnTrack Overpayment EXCR		\$-124.90					
12/01/2023	ELECTRIC SERVICE		\$235.35					
12/01/2023	Regular Bill	12/26	\$37.10		0774/0000	59988A	31	1294

01/03/2024	OTRK Arrearage Credit		\$-4.75					

01/04/2024	ELECTRIC SERVICE		\$155.73					
01/04/2024	Regular Bill	01/25	\$188.08	\$32.35	0911/0000	60869A	34	881

02/01/2024	Payment		\$-238.00					

02/02/2024	OnTrack Overpayment EXCR		\$-49.92					
02/02/2024	ELECTRIC SERVICE		\$157.67					
02/02/2024	Regular Bill	02/26	\$107.75		0987/0000	61776A	29	907

03/05/2024	OnTrack Credit		\$-16.38					
03/05/2024	ELECTRIC SERVICE		\$178.38					
03/05/2024	Regular Bill	03/26	\$269.75	\$91.37	0928/0000	62815A	32	1039

03/07/2024	Payment		\$-238.00					

04/04/2024	ELECTRIC SERVICE		\$146.08					
04/04/2024	Regular Bill	04/25	\$177.83	\$31.75	0667/0000	63648A	30	833

EXHIBIT

2

exhibitmaker.com

PPL ELECTRIC EXHIBIT NO. 2

Account Contact History

Account: [REDACTED] Customer Name: JOANN ROBERTS

From 4/5/2020 to 4/5/2024

Contact Date	Contact Type	Remarks	User
2024-04-05	Electric Outage - Issuance	Cond 1 Cond 2 Cond 3 Cond 4 Note 317459 Call Type 60 Tree on Wire Comments Tree is uprooted and laying against the wire. Pole to pole. Tree weight is pulling down the wires. No power problem.	WCT
2024-04-05	Electric Outage - Issuance	Cond 1 Cond 2 Cond 3 Cond 4 Note e189790 Call Type 60 Tree on Wire Comments TREE IS TEETERING OVER WIRES TREE IS PULLED OUT OF GROND WIRES SRE FROM POLE TO POLE NO POWER PROBLEMS AT THIS TI	WCT
2024-03-06	Special Situation	PAYMENTUS_WEB paid 238.00	SELF SERVICE USER
2024-02-05	SC - PUC Formal Complaint	The customer filed Formal Complaint Docket No. F-2024-3046011- WATT ID 4162420	E02623
2024-02-05	Miscellaneous	WATT CCC Formal Complaint - Ability to Pay Bill Dispute Work Item 4162420 Created	CARMEN P URBAN
2024-01-31	Special Situation	PAYMENTUS_WEB paid 238.00	SELF SERVICE USER
2024-01-18	OT Reminder Call		CUBCL026
2023-12-11	SC - GRACE EXTENSION	Caller Back Office Ratepayer. SC Status from Open to Closed Cust Rights Given Y Cust Satisfied Y Comments BCS 3940212 DEC CLOSED 12 09 2023 THE CUSTOMER S ONTRACK PLAN WAS TRANSITIONED TO THE REVISED PERCENT OF INCOME PLAN ON 08 04 2023 WITH A MONTHLY RATE OF 162.00. THE COMPANY MANAGED THE CUSTOMER S ONTRACK PROPERLY.	CUCL143
2023-11-30	Special Situation	PAYMENTUS_WEB paid 238.00	SELF SERVICE USER
2023-11-22	Electric Outage - Issuance	Cond 1 Cond 2 Cond 3 Cond 4 Note OMS_CSS.services.contacts.privcontacts notification_PPL_CUSTOMER_CONTACT_VIEWPublishDocument USER_NAME Call Type 01 AMI Power Down Event Comments none	MTR
2023-11-22	LIHEAP	2023 LIHEAP Application mailed to customer. If customer calls please encourage customer to apply.	CSLET
2023-10-30	Special Situation	PAYMENTUS_WEB paid 119.00	SELF SERVICE USER
2023-10-24	Special Situation	PAYMENTUS_WEB paid 119.00	SELF SERVICE USER
2023-10-13	Special Situation	PAYMENTUS_WEB paid 119.00	SELF SERVICE USER
2023-09-27	Data Repair	DR_INC10872729 REVERT SUSPENDED OT ACCOUNTS	CSSDR044
2023-09-26	Data Repair	DR_INC10872729 SUSPEND OT [REDACTED]	CSSDR044
2023-09-07	SC - PUC Informal Complaint	PUC MDIA BCS 3940212	CUCL143
2023-09-07	Data Repair	REQ10866979 - DATA REPAIR OT INSTALLMENTS.	CSSDR044
2023-09-01	OnTrack Customer	Caller JOSEPH ROBERTS Other User Comments cx concern of OT mnthly amount adv cx 162.00 is mnthly payment amount Rev 09 01 2023 16 51 adv cx of pro cons of OT program	MAHABERETA NELSON
2023-09-01	WUR Assessment	JOSEPH ROBERTS Other. Caller s Concern OnTrack. Position Stated Yes. Sat Yes. WUR Required No. Provided PUC No.	MAHABERETA NELSON
2023-09-01	WUR Assessment	Back Office Ratepayer. Caller s Concern OnTrack. Position Stated Yes. Sat Yes. WUR Required No. Provided PUC No.	MAHABERETA NELSON
2023-08-28	Correspondence - General	Template Name Master Utility Report Created By ANA SAMUELS Letter Edited No CS Letters ID 5400779	CSLET
2023-08-28	SC - GRACE EXTENSION	Suspend Charge automatically added by CSLET	CSLET
2023-08-28	OnTrack Customer	Caller JOSEPH ROBERTS Other User Comments cci regarding new ot amount adv it is a percentage of income or usage whichever less i placed on hold to get formula and do math and instead of hold disco call	ANA SAMUELS
2023-08-28	WUR Assessment	JOSEPH ROBERTS Other. Caller s Concern Account Balance. Position Stated Yes. Sat No. WUR Required Yes. Caller s Concern OnTrack. Position Stated Yes. Sat No. WUR Required No. Caller s Concern Payment Assistance. Position Stated Yes. Sat No. WUR Required No. Provided PUC No.	ANA SAMUELS
2023-08-28	SC - OnTrack Dispute	Caller JOSEPH ROBERTS Other. ontrack amount	E184177
2023-08-21	Correspondence - General	Template Name OnTrack Standard Agreement Letter Created By Heather Fahnestock Letter Edited No CS Letters ID 5385892	CSLET
2023-08-21	OnTrack Information/Maintenance	Customer enrolled in OnTrack OT Recertified. Monthly payment is 162.00. Submitted by - Agency TREHAB Inc. Agent Heather Fahnestock	HFAHNEST
2023-08-21	ONTRACK ENROLLMENT PENDING	Work submitted by hfahnestock@trehab.org Agency Name TREHAB Inc.	SELF SERVICE USER
2023-08-21	Financial Statement Added		HFAHNEST
2023-08-21	OnTrack - Ineligible	OT Agreement canceled by hfahnestock@trehab.org Agency TREHAB. Cancel Reason Income Change	SELF SERVICE USER
2023-08-11	OnTrack Customer	Caller James Roberts Son User Comments cx called to check status of OT adv of OT current bill 08 04 2023 with monthly installs of 156.00	NICOLA BLOUNT
2023-08-11	WUR Assessment	James Roberts Son. Caller s Concern Payment Assistance. Position Stated Yes. Sat Yes. WUR Required No. Provided PUC No.	NICOLA BLOUNT

Contact Date	Contact Type	Remarks	User
2023-08-10	OnTrack Customer	Income verification email reminder sent.	SELF SERVICE USER
2023-08-08	OnTrack Customer	Transitioned OnTrack account. New installment type is Percent of Income	CSLET
2023-08-04	OnTrack Transition Successful	OnTrack Transition	
2023-08-03	Financial Statement Added		HFAHNEST
2023-08-02	OnTrack Customer	OnTrack application submitted by EUWEB Source EuWeb	SELF SERVICE USER
2023-07-19	OnTrack Customer	Informational letter sent as an advance notice of OnTrack changes.	CSLET
2023-07-19	OnTrack Customer	Informational letter sent as an advance notice of OnTrack changes.	CSLET
2023-07-18	OT Reminder Call		CUBCL026
2023-07-17	OnTrack Customer	returned call. vm to call back regarding recert due Submitted by Debbie S Agency TREHAB	SELF SERVICE USER
2023-07-14	OnTrack Customer	Caller Back Office Ratepayer. RP consent to sw son jame to complete ot app. however james was non compliant when asked about the amount spent per month on food so he stated just save the application and hu.	STEPHANIE WAITERS
2023-07-14	Credit	Caller james robert Son User Comments sw son recd automated time to reapply spoke w agency but wasnt given ans ed can do over phone or online SYTEM ISSUE - app will not load req cx cb in hr or can do online. sat y	LEAH KENNY
2023-07-14	WUR Assessment	james robert Son. Caller s Concern OnTrack. Position Stated Yes. Sat Yes. WUR Required No. Caller s Concern Payment Assistance. Position Stated Yes. Sat Yes. WUR Required No. Provided PUC No.	LEAH KENNY
2023-07-14	OnTrack Customer	Tried to return call left msg. Submitted by Trish J Agency TREHAB	SELF SERVICE USER
2023-07-05	OnTrack Customer	Automated phone call scheduled to remind customer it s time to reapply for OnTrack.	CSLET
2023-07-05	Correspondence - General	Template Name Ontrack Recertification Created By CSLET Letter Edited No CS Letters ID 5243651	CSLET
2023-06-19	OT Reminder Call		CUBCL026
2023-05-17	OT Reminder Call		CUBCL026
2023-04-17	OT Reminder Call		CUBCL026
2023-02-14	OT Reminder Call		CUBCL026
2023-02-02	Data Repair	██████████ - Reads Workaround	CSSDR044
2023-01-23	OT Reminder Call		CUBCL026
2022-12-15	OT Reminder Call		CUBCL026
2022-11-28	OnTrack Customer	OnTrack monthly payment on the November bill did not include the 7.00 CAP Plus amount. The December bill may be corrected to include the CAP plus and the additional 7.00 not charged in November.	CSLET
2022-11-15	LIHEAP	LIHEAP application mailed to customer	CSLET
2022-11-15	OT Reminder Call		CUBCL026
2022-10-17	OT Reminder Call		CUBCL026
2022-09-22	Electric Outage - Issuance	Cond 1 Cond 2 Cond 3 Cond 4 Note OMS_CSS.services.contacts.privcontacts notification_PPL_CUSTOMER_CONTACT_VIEWPublishDocument USER_NAME Call Type 01 AMI Power Down Event Comments none	MTR
2022-09-15	OT Reminder Call		CUBCL026
2022-08-17	OT Reminder Call		CUBCL026
2022-07-07	WEB Customer Initiated Payment	Scheduled date 7 17 2022 Amount 119.00 User ██████████ Owner YES. Confirmation Number 22071701	SELF SERVICE USER
2022-06-08	WEB Customer Initiated Payment	Scheduled date 6 17 2022 Amount 119.00 User ██████████ Owner YES. Confirmation Number 22061719	SELF SERVICE USER
2022-05-09	WEB Customer Initiated Payment	Scheduled date 5 10 2022 Amount 119.00 User ██████████ Owner YES. Confirmation Number 22051080	SELF SERVICE USER
2022-04-13	Miscellaneous	WATT Billing - OnTrack Credits Debits Work Item 2850464 Completed	KEVIN DIEHL
2022-04-08	OnTrack Customer	worked watt 2850464. Canceled the last bill and moved the extra 119 to overpayment. Rebilling account back to current	KEVIN DIEHL
2022-04-08	Cancel/Only Service	worked watt 2850464. Canceled the last bill and moved the extra 119 to overpayment. Rebilling account back to current	KEVIN DIEHL
2022-04-07	WUR Assessment	james roberts Son. Caller s Concern Accepted Methods of Payment. Position Stated Yes. Sat Yes. WUR Required No. Caller s Concern OnTrack. Position Stated Yes. Sat Yes. WUR Required No. Caller s Concern Payment Assistance. Position Stated Yes. Sat Yes. WUR Required No. Provided PUC No.	ERICA WARTHEN
2022-04-07	Credit	Caller james roberts Son. due 04 25 adv cust no bal owed for bill due 04 25 adv request to have 119.00 post towardas bill due 04 25 have not been updated as of yet adv cust to make sure he wait for bill to print before he made paymnts adv payment for 119.00 returned 03 23 adv there was not return payment fee on bill that print 04 04 22	ERICA WARTHEN
2022-04-07	Credit	Caller james roberts Son. cust cld to get amt due adv cust 119.00 due 04 04 adv cust payment made for 238.00 went towards ot monthly ikn stall of 119.00 that was due 03 28 Rev 04 07 2022 17 00 adv cust request watt have been submitted on 04 05 to have payment that was made 03 31 for 238.00 to cover bill amt of 119.00 tjat was due 03 28 amd 119.00	ERICA WARTHEN

Contact Date	Contact Type	Remarks	User
2022-04-05	Billing	Caller James Roberts Son. March and April bills. Adv over pymts go towards past due balance and not the next OT bill. Adv going forward don t pay until a bill generate. Sat	DENISE WALKER
2022-04-05	Billing	Caller James Roberts Son User Comments cb second attempt. Called customer back let them know that they wasn t charged a late fee nor return pymt fee. Adv account is up to date and still on OT. Adv 119 due on 4 25. He stated the 238 was March and April bills. Adv pymt of 119 made on 3 21 returned on 3 23 and that was for 3 28 bill. Adv 238 will cover	DENISE WALKER
2022-04-05	WUR Assessment	... s. WUR Required No. Provided PUC No.	DENISE WALKER
2022-04-05	WUR Assessment	James Roberts Son. Caller s Concern Account Balance. Position Stated Yes. Sat Yes. WUR Required No. Caller s Concern OnTrack. Position Stated Yes. Sat Yes. WUR Required No. Caller s Concern Payment Assistance. Position Stated Yes. Sat Yes. WUR Required No. Caller s Concern Miscellaneous - WUR will NOT be sent. Position Stated Yes. Sat Ye ...	DENISE WALKER
2022-04-05	Miscellaneous	customer made a pymt of 238 that posted 3 31 to cover returned pymt for March and the April bill. please place 119 for the 4 25 bill	DENISE WALKER
2022-04-05	Miscellaneous	WATT Billing - OnTrack Credits Debits Work Item 2850464 Created	DENISE WALKER
2022-04-04	OB Call - Outreach	Caller Back Office Ratepayer. cb first attempt. left vm Rev 04 04 2022 08 21 Called James Roberts at [REDACTED]	DENISE WALKER
2022-04-01	OnTrack Customer	Caller James Roberts Son. Confirmed pymt was returned on 03 23 22 due to invalid acct info being submitted to the bank - Expl not being removed from OT - adv no late chgs or returned chk fee on the acct but will have OT rep return his call Monday to clarify confirm. Adv we can refund both as 1x courtesy if they are assessed since this is not a habit. SAT	AMANDA R BACHMAN
2022-03-29	Billing	Caller James Roberts son Roommate. cont deceased rp process advised it has changed adv ana was not aware of change until 3 16 when it was rolled out adv with adv her sup of concerns. Cust satisfied with discussion no final position sat not assessed no callback necessary.	LISBETH FREEMAN
2022-03-29	Billing	Caller James Roberts son Roommate. esc callback sw James roberts son occupant. He was upset about interaction on 3 10 with LE that she was prying and asking unnecessary questions. Unable to pull call. Apologized advised would inform agents sup about his concerns. No callback necessary. Also upset about agent AS on 3 11 that she was defensive about	LISBETH FREEMAN
2022-03-28	Credit	Caller JAMES ROBERTS Son User Comments SON CALLED IN BECAUSE HE RECV NOTICE TBAT A PMT WAS RETURNED EXP I SHOW PMT MADE ON THE 21ST AND RETURN ON THE 23RD DUE TO UNABLE LOCATE ACCT INFO VERF LAST 4 OF BANK INFO EXP IT MAY HAVE BEEN A NUMBER IN THE MIDDLE THAT WAS INCORRECT EXP MOM CAN CALL AND WE CAN REENTER BANK INFO AND PROCESS PMT AGAIN	ROBIN STONE
2022-03-28	WUR Assessment	JAMES ROBERTS Son. Caller s Concern OnTrack. Position Stated Yes. Sat Yes. WUR Required No. Caller s Concern Payment Assistance. Position Stated Yes. Sat Yes. WUR Required No. Provided PUC No.	ROBIN STONE
2022-03-25	Miscellaneous	Caller james roberts Son. CONT - reached out to escalation team instructed to issue cb sent flex. informed cx that should rec a supv cb either monday or tue. is aware calls need to be pulled 1st.	LEAH KENNY
2022-03-25	Miscellaneous	Caller james roberts Son. CONT - disconnected on mr roberts she never called back had spoken to another rep who ed that escalation team would cb. he has not recd a cb issue w online has been resolved he did speak w agency about his application trehab told him it was filled out correctly ed in the ot dept if there is a chng we direct cust to agency	LEAH KENNY
2022-03-25	Miscellaneous	Caller james roberts Son User Comments sw son very upset regarding calls made w LINDA M EIBACH 3 10 2022 Thu 3 30 PM he only wanted to speak w her regarding online profile fixing the phone . mr roberts was then questioned about his ot application and felt she was trying to get him off ot asked for supv ANA SAMUELS spoke w him about another call dis	LEAH KENNY
2022-03-25	WUR Assessment	james roberts Son. Caller s Concern OnTrack. Position Stated No. Investigation reqd No. . WUR Required No. Caller s Concern Investigation into Prior Concern. Position Stated No. Investigation reqd No. . WUR Required No. Provided PUC No.	LEAH KENNY
2022-03-24	Credit	SENT CUSTOMER NOTIFICATION OF RETURNED PAYMENT	CSLET
2022-03-23	Returned Item	RETURNED ITEM AMOUNT 119.00 DATE OF RETURNED ITEM 2022-03-23 REASON R03 NO ACCT UNABLE TO LOCATE ACCT	CUBAR080
2022-03-17	Billing	Caller James Roberts Son User Comments cci about assist mother w online profile cx stated acct phone cx stated Trehab contacted by ppl about OT app cx stated Trehab gave info that OT app correct cx stated sw escalations group was unsatisfied w call cx req sw sup cx req call back cx not sat und	JULIE GANONG
2022-03-17	WUR Assessment	James Roberts Son. Caller s Concern OnTrack. Position Stated Yes. Sat No. WUR Required No. Caller s Concern Payment Assistance. Position Stated Yes. Sat No. WUR Required No. Provided PUC No.	JULIE GANONG
2022-03-11	Credit	Caller james roberts Son. adv once we are informed rp is deceased we canno longer bill the customer account state he was adv by puc we no longer allowed to do this placed on hold to see if this information was correct customer hung u no sat assessed also sup will be pulling call and reviewing	ANA SAMUELS

Contact Date	Contact Type	Remarks	User
2022-03-11	Credit	Caller james roberts Son User Comments on 1 21 cust called in when he called in he adv the rp is deceased and agent adv of procedure once we are adv the rp is decease later that night cust called in for a surviving spouse which was honored cust does not agree with what the agent did feels if he called in for one thing why would she pry into this process	ANA SAMUELS
2022-03-11	WUR Assessment	james roberts Son. Caller s Concern Miscellaneous - WUR will NOT be sent. Position Stated Yes. Sat No. WUR Required No. Provided PUC No.	ANA SAMUELS
2022-03-11	OnTrack Customer	s w James-referred to Liheap Submitted by Debbie Swendsen Agency TREHAB	SELF SERVICE USER
2022-03-11	OnTrack Customer	s w James-confirmed he is on the OnTrack app with his mother. Confirmed she has the only income.He stated rep was questioning app. Submitted by Debbie Swendsen Agency TREHAB	SELF SERVICE USER
2022-03-11	WUR Assessment	James Roberts Son. Caller s Concern OnTrack. Position Stated Yes. Sat No. WUR Required No. Caller s Concern Miscellaneous - WUR will NOT be sent. Position Stated Yes. Sat No. WUR Required No. Provided PUC No.	TAYLOR ROSIE
2022-03-11	Credit	Caller James Roberts Son. call that he had with Linda around 3 30 PM on 3 10 22 and he called from 570-587-0116 and cust said the sup can call him back at that as well Rev 03 11 2022 08 52 cust understood that a sup will call him back after pulling the call	TAYLOR ROSIE
2022-03-11	Credit	Caller James Roberts Son. supposed to ask him all those questions and she shouldve just helped him set up the online profile adv he did miss a call from a sup this morn and I was trying to see if a sup was available but there was not one available at the time adv a sup will call back asap adv I will tell the sup to pull the	TAYLOR ROSIE
2022-03-11	Credit	Caller James Roberts Son. had nothing to do with the online profile and was asking about the OT app and his situation and if he lives in the home or if he s working and she said she will send an email to Trehab to take action and add him to the OT app bc he wasnt on the app and he wants the call pulled bc he believes Linda was not	TAYLOR ROSIE
2022-03-11	Credit	Caller James Roberts Son. cci asking for a sup bc he was trying to set up an online profile for his mother but an agent told him that her phone was removed in Jan which is why they couldnt get the verification code then he was transferred to the add acct dep and spoke with someone named Linda who was asking questions that	TAYLOR ROSIE
2022-03-11	Credit	Caller Back Office Ratepayer. esc callback no answer left message 1st attempt	ANA SAMUELS
2022-03-10	OnTrack Customer	Caller James Roberts Son User Comments CCI to req sup b c prev agent from Add Acct asked abt OT info adv the cust she would email trehab for his OT prog to be reviewed adv cust sup will cb w i 24-48 hrs.	ELAINE AIKENS
2022-03-10	WUR Assessment	James Roberts Son. Caller s Concern Miscellaneous - WUR will NOT be sent. Position Stated Yes. Sat Yes. WUR Required No. Provided PUC No.	ELAINE AIKENS
2022-03-10	WEB Customer Initiated Payment	Scheduled date 3 20 2022 Amount 119.00 User ██████████ Owner YES. Confirmation Number 22032012	SELF SERVICE USER
2022-03-10	WEB Maintain Bill Account	Updated email address from UnKnown to ██████████	SELF SERVICE USER
2022-03-10	Miscellaneous	Caller james roberts Son User Comments added ph and email addr to account so cust can set up web profile. sat	LINDA M EIBACH
2022-03-10	WUR Assessment	james roberts Son. Caller s Concern Miscellaneous - WUR will NOT be sent. Position Stated Yes. Sat Yes. WUR Required No. Provided PUC No.	LINDA M EIBACH
2022-03-10	Customer Maintained	sw james roberts son added email addr to acct	LINDA M EIBACH
2022-03-10	Maintain Bill Account	sw james roberts son added ph to account	LINDA M EIBACH
2022-03-10	OnTrack Customer	Caller James Roberts Son. CCI b c unable to activate online acct adv cust called in Jan due to prev rp father is deceased not enough info on acct for enh verif tranf to add acct. SAT	ELAINE AIKENS
2022-03-10	WUR Assessment	James Roberts Son. Caller s Concern Call Transfer. Position Stated No. Investigation reqd No. . WUR Required No. Caller s Concern Miscellaneous - WUR will NOT be sent. Position Stated Yes. Sat Yes. WUR Required No. Provided PUC No.	ELAINE AIKENS
2022-03-01	SC - GRACE EXTENSION	BCS 3818879 DEC CLOSED 02 28 2022 ADMITTED THE CUSTOMER S COMPLAINT WAS ACCURATE AND THE THREAT OF TERMINATION WAS OUTSIDE REGULATIONS. CUSTOMER WAS SATISFIED AND AGREED TO ALLOW THE CASE TO BE CLOSED. 56.151 PROVIDECUST OCCU ENOUGH INFO FOR WITH THE INFORMATION NECESSARY FOR AN INFORMED JUDGMENT	e02239
2022-02-18	Electric Outage - Issuance	Cond 1 Cond 2 Cond 3 Cond 4 Note OMS_CSS.services.contacts.privcontacts.notification_PPL_CUSTOMER_CONTACT_VIEWPublishDocument USER_NAME Call Type 01 AMI Power Down Event Comments none	MTR
2022-02-17	OnTrack Customer	Caller James Roberts Son User Comments cci about last paymnt received cx stated paymnt mailed 2 8 22 119 adv not yet received adv no lpc for OT adv have rp call back enroll paymnt posted notification cx sat	JULIE GANONG
2022-02-17	WUR Assessment	James Roberts Son. Caller s Concern OnTrack. Position Stated Yes. Sat Yes. WUR Required No. Caller s Concern Payment Assistance. Position Stated Yes. Sat Yes. WUR Required No. Provided PUC No.	JULIE GANONG
2022-01-25	OnTrack Customer	Caller james roberts Other. bill to generate once this cycle ends and go by new due date i told him he wasnt informed correctly about the debt forgiveness of his reg PPL bill so told him once more he doesnt pay reg bill he waits for new ot bill 119	ZENAI DA SANTIAGO

Contact Date	Contact Type	Remarks	User
2022-01-25	OnTrack Customer	Caller james roberts Other User Comments cci became aware about ot program and applied for that but trehab told him he still has to pay reg bill due tmrw 1 26 22 and he was upset because op help wont answer or any help i explained that his reg bill he does not pay because it is now debt forgiveness with ot program so all he has to do is wait for new ot	ZENAIIDA SANTIAGO
2022-01-25	WUR Assessment	james roberts Other. Caller s Concern OnTrack. Position Stated Yes. Sat Yes. WUR Required No. Caller s Concern Payment Assistance. Position Stated Yes. Sat Yes. WUR Required No. Provided PUC No.	ZENAIIDA SANTIAGO
2022-01-25	Credit	Caller JOSEPH ROBERTS Other User Comments Cust had concerns about the L.I.P and about his bill. Transferred to billing for further assistance	KATIE EVERAGE
2022-01-25	WUR Assessment	JOSEPH ROBERTS Other. Caller s Concern Call Transfer. Position Stated No. Investigation reqd No. . WUR Required No. Provided PUC No.	KATIE EVERAGE
2022-01-25	Credit	Caller Back Office Ratepayer. CALL CAME THRU AND NO REPSONSE..DEAD AIR..C	SHAKETIA BROWN
2022-01-25	SC - PUC Informal Complaint	PUC MDIA BCS 3818879	CUCL143
2022-01-24	OnTrack Customer	Customer enrolled in OnTrack Active . Monthly payment is 112.00. This may include the current CAP Plus charge. Submitted by - Agency TREHAB Inc. Agent Debbie Swendsen	DSWENDSE
2022-01-24	Correspondence - General	Template Name OnTrack Standard Agreement Letter Created By Debbie Swendsen Letter Edited No CS Letters ID 4479916	CSLET
2022-01-24	ONTRACK ENROLLMENT PENDING	Work submitted by dswendsen@trehab.org Agency Name TREHAB Inc.	SELF SERVICE USER
2022-01-24	Financial Statement Added		DSWENDSE
2022-01-24	Connect/Disconnect	Caller James Robert Son User Comments James Robert Calling to make complaint on the account about previous Rep and stop services of a decease of a person Explained anytime PPL is notified the acct passed away We have to stop services next day or we can place in estate account or have to place in new persons name if do not wish to take over call no sat	JACQUELINE HOLLIDAY
2022-01-24	WUR Assessment	James Robert Son. Caller s Concern Miscellaneous - WUR will NOT be sent. Position Stated Yes. Sat No. WUR Required No. Provided PUC No. Interested in SO Not on Phone.	JACQUELINE HOLLIDAY
2022-01-24	Credit	Caller JAMES ROBERTS Son User Comments CCI with concerns about prev rep discussing switching service from deceased father into mothers name. Confirmed service was transferred into mothers name JOANN ROBERTS. Tried to discuss concerns with customer and provide assistance customer still requested sup. Transferred to sup. Not SAT.	CHASITY MORRISON
2022-01-24	WUR Assessment	JAMES ROBERTS Son. Caller s Concern Miscellaneous - WUR will NOT be sent. Position Stated Yes. Sat No. WUR Required No. Provided PUC No. Interested in SO Not on Phone.	CHASITY MORRISON
2022-01-24	Credit	Caller Back Office Ratepayer. 1st attempt escalated call back no answer left message	JACQUELINE HOLLIDAY
2022-01-24	OnTrack Customer	OnTrack enrollment - refer questions to OnTrack agency	
2022-01-22	Correspondence - General	Template Name Surviving Spouse Created By Lowery Jasmine Letter Edited No CS Letters ID 4478866	CSLET
2022-01-21	Billing	Caller James Roberts Son User Comments CCI stated he was upset services were protected advised to call in MOnday to speak with Sup about previous rep	CRYSTAL BROWN
2022-01-21	WUR Assessment	James Roberts Son. Caller s Concern Miscellaneous - WUR will NOT be sent. Position Stated Yes. Sat Yes. WUR Required No. Provided PUC No.	CRYSTAL BROWN
2022-01-21	Connect/Disconnect	Caller JOANN ROBERTS Spouse. rep crystal brown spoke with customer got permission to place services in spouse name due to husband has passed updated voided order and sent surviving spouse letter.	JAMINE LOWERY
2022-01-21	Maintain Primary Customer	due to husband being deceased the surviving spouse will be primary rp joann roberts	JAMINE LOWERY
2022-01-21	Maintain Primary Customer	due to husband being deceased the surviving spouse will be primary rp joann roberts	JAMINE LOWERY
2022-01-21	Disconnect Voided	void	JAMINE LOWERY
2022-01-21	Maintain Additional Account Names	Customer JOANN ROBERTS added to account [REDACTED] as Spouse.	JAMINE LOWERY
2022-01-21	WUR Assessment	James Roberts Son. Caller s Concern Miscellaneous - WUR will NOT be sent. Position Stated Yes. Sat Yes. WUR Required No. Provided PUC No.	CRYSTAL BROWN
2022-01-21	Credit	Caller James Roberts Son. S w Joann Roberts gave permission for service to be placed in her name--Supervisor Jasmine will update Account advised account number will stay the same	CRYSTAL BROWN
2022-01-21	Electric Outage - Issuance	Cond 1 Cond 2 Cond 3 Cond 4 Note IVR Call Type 10 No Lights Comments none	IVR
2022-01-21	Credit	Caller James Roberts Son. Adv if unable to get name changed will have to disc service nbd. Issue sup call back per caller request	ASHLEY IRICK
2022-01-21	Credit	Caller James Roberts Son User Comments Cust called to inform trying to get on ot and want to confirm no term or late fees will apply in the meantime. States rp is deceased. Adv can not legally bill a deceased person. Cust states unable to get spouse of rp on the line and shes not home. Requested to have someone call her back at [REDACTED] Joanne Roberts	ASHLEY IRICK
2022-01-21	WUR Assessment	James Roberts Son. Caller s Concern Billing Payment - WUR will be sent. Position Stated No. Investigation reqd No. . WUR Required No. Provided PUC No.	ASHLEY IRICK

Contact Date	Contact Type	Remarks	User
2022-01-21	Disconnect Issued	Electric Caller James Roberts Son WantDate 01 22 2022 M A Customer Refused Ratepayer deceased Send Joint1 Letter No Customer Satisfied Understands No System CTP	ASHLEY IRICK
2022-01-17	OnTrack Customer	OnTrack application submitted by EUWEB Source EuWeb	SELF SERVICE USER
2021-10-29	Electric Outage - Issuance	Cond 1 Cond 2 Cond 3 Cond 4 Note e153469 Call Type 10 No Lights Comments none	WCT
2020-11-18	LIHEAP	LIHEAP application mailed to customer	CSLET
2020-07-28	Reoccurring OnTrack Referral	You were Referred. Reminder call made. Call reminds the customer to check for application and submit back to agency in their county.	CSLET
2020-07-28	Reoccurring OnTrack Referral	You were Referred. Reminder call made. Call reminds the customer to check for application and submit back to agency in their county.	CSLET
2020-07-22	Correspondence - General	Template Name Ontrack Referral Created By CSLET Letter Edited No CS Letters ID 3679633	CSLET
2020-07-21	Credit	Caller JOSEPH ROBERTS Ratepayer User Comments cci wanted to know of any programs to help his senior citizen mother get an ac said he spoke to PUC and they referred him to PPL to apply for cap program i did explain ot program and wrap program for her i sent application to him to help her fill out and gave wrap number 18882326302	ZENAIDA SANTIAGO
2020-07-21	WUR Assessment	JOSEPH ROBERTS Ratepayer. Caller s Concern OnTrack. Position Stated Yes. Sat Yes. WUR Required No. Caller s Concern Payment Assistance. Position Stated Yes. Sat Yes. WUR Required No. Provided PUC No. Interested in SO No.	ZENAIDA SANTIAGO
2020-07-21	SC - RECURRING REFERRAL TO OTRK	Caller JOSEPH ROBERTS Ratepayer. send customer ot application to home	E189950

EXHIBIT

4

exhibit4.com

PPL ELECTRIC EXHIBIT NO. 4

PPL Electric Utilities
827 Hausman Road
Allentown, PA 18104-9392
Tel. 800.342.5775 Fax 484.634.3484
www.pplelectric.com



JOANN ROBERTS
[REDACTED]

August 21, 2023

Bill Account Number: [REDACTED]

Dear JOANN ROBERTS:

Congratulations! We are pleased to inform you that we approved your application for the OnTrack program. This program offers a fixed monthly payment and debt forgiveness if you have a past due balance. Each month you're enrolled in OnTrack, we'll pay the difference between your actual usage and your monthly payment, up to the maximum OnTrack credit amount.

Here are some key points to know about your plan:

- If your income changes, please notify your OnTrack agency right away so we can review your eligibility and payment amount.
- We'll let you know when it's time to reapply and update your income.

Conserving electricity will help you be successful on OnTrack. Our WRAP program offers free energy-saving products and tips to help you lower your bill. If you haven't already, we encourage you to learn more and apply at pplelectric.com/wrap or call 1-888-232-6302.

Thank you for your interest in the OnTrack program and for being a valued customer.

Sincerely,

PPL Electric Utilities



Information for you about PPL Electric Utilities' OnTrack Program

Customer: **JOANN ROBERTS**

Account No: **[REDACTED]**

Date: **8/21/2023**



How much you'll pay:

\$162.41 each month for the next 12 months.



When you should pay:

You'll start your payments after you receive your first OnTrack bill. To remain in the program and benefit from debt forgiveness, be sure to pay your bill each month by your due date.



How you should save energy:

Sign up for the WRAP program at pplelectric.com/WRAP or by calling 1-888-232-6302. This program helps you save electricity and helps prevent you from exceeding your maximum OnTrack credit of **\$2,150.41**



Your OnTrack contact:

Work with your OnTrack agency by providing any information the agency requests. Notify the OnTrack agency of any changes in your household income or occupants.

When you pay your OnTrack amount by your due date, PPL Electric Utilities will:

- Forgive **\$4.75** per month of your overdue amount each time you make your monthly payment.
- Provide you with information on how much electricity you're using.
- Prevent any collection activity on the overdue balance on your account.

If you have any questions about OnTrack or other programs you may qualify for, please call PPL Electric Utilities at 1-800-342-5775.

Agency Name: **TREHAB, Inc.**

Agency Email address: **PPLOnTrack@trehab.org**

Agency Phone Number: **570-253-8941**

EXHIBIT

5

exhibitclerk.com

PPL ELECTRIC EXHIBIT NO. 5

PPL Electric Utilities
827 Hausman Road
Allentown, PA 18104-9392
Tel. 800.342.5775 Fax 484.634.3484
www.pplelectric.com



JOANN ROBERTS
[REDACTED]

July 18, 2023

Bill Account Number: [REDACTED]

Dear JOANN ROBERTS:

Thank you for participating in our OnTrack program. The program terms will be changing for all customers in early August 2023. This letter is advance notice of the changes to come.

Currently, your monthly OnTrack payment is based on a percentage of the average electric bill at your home and your total household income. When the changes take effect, your monthly payment will be based on a percentage of your income or your average electric bill.

You don't need to take any action now. If your monthly payment amount is going to change, we'll send you another letter in advance with specific information.

For more details on the program changes, please visit pplelectric.com/newontrackchanges or scan the QR code below.



You are a valued customer, and we appreciate your continued participation in OnTrack.

Sincerely,

PPL Electric Utilities



PPL ELECTRIC EXHIBIT NO. 6

II. PROGRAM DESCRIPTIONS

A. ONTRACK

1. Overview and Background

OnTrack is a special payment program for low-income households at or below 150 percent of the Federal Poverty Income Guidelines (“FPIG”) who have trouble paying the full cost of their electric bill. OnTrack is PPL Electric’s CAP and is one of its Universal Service Programs. OnTrack, which started as a pilot in 1993, is funded by residential customers and administered by partner organizations.

The primary customer benefits of OnTrack include:

- A reduced fixed payment amount based on a percent of income
- Arrearage forgiveness over 24 months
- Protection against shutoff of electric service
- Referrals to other programs and services
- Exemption from late payment fees, including on final bills

PPL Electric uses the Remote Entity Portal System (“REP” or “System”) to establish a 24-month debt forgiveness timetable for all new OnTrack enrollees. The customer’s outstanding balance amount is reviewed at the time of enrollment, and the overdue amount is frozen. The outstanding balance is forgiven in a straight-line method. Equal installments are forgiven over the 24-month period. The debt forgiveness installments are shown on the customer’s statement of account and in the Company’s Customer Service System (“CSS”) as arrearage forgiveness credits. PPL Electric allows OnTrack customers to receive pre-program arrearage forgiveness for each on-time and in-full monthly payment, regardless of OnTrack arrears (*i.e.*, in-program arrears), and retroactive forgiveness for any months missed once the customer pays the OnTrack balance in full.

The 24-month forgiveness timetable provides benefits to customers and the Company. From customers’ perspectives, they can see significant progress every month as the debt owed to PPL Electric is reduced. This helps motivate customers to continue making on-time payments and managing their usage to remain in the program and ultimately see the pre-program arrears amount (*i.e.*, overdue balance) reduced to zero. The Company benefits by receiving recovery of receivables and ultimately lower overdue receivables.¹

¹ Under the prior USECP, PPL Electric utilized an 18-month debt forgiveness timetable for OnTrack customers. As part of the transition from an 18-month to 24-month forgiveness timetable under this USECP, PPL Electric will allow OnTrack customers who enroll prior to the implementation of the Percent of Income (“PIP”) option to continue receiving arrearage forgiveness over 18 months.

In July 1992, the Commission adopted a Policy Statement that established guidelines for CAPs. The Commission encouraged all electric and gas utilities to implement CAP pilots. After receiving approval from the Commission for its pilot proposal, PPL Electric implemented OnTrack in December 1993. The pilot began in one region and expanded to all regions by June 1994. The Company agreed to enroll 2,000 low-income customers in OnTrack. PPL Electric stopped the pilot program on July 31, 1995.

On December 3, 1996, Governor Tom Ridge signed a law that increased competition in the electric utility industry. The new law gave consumers the opportunity to choose their electric generation supplier. The legislation required electric distribution companies to continue their various assistance programs (e.g., CARES, Operation HELP, OnTrack and WRAP).

As a result of its August 12, 1998, Restructuring Settlement Agreement with all interested parties, PPL Electric agreed to expand OnTrack expenditures significantly from 1999 through 2002. During this four-year period, the program's annual budget increased from \$5.875 million in 1999 to \$11.7 million in 2002. OnTrack expenditures over the past six years have been as follows:

Program Year	OnTrack Expenditures
2017	\$80.9 Million
2018	\$80 Million
2019	\$82 Million
2020	\$77.5 Million
2021	\$85.5 Million
2022	\$112.2 Million ²

2. Objectives

PPL Electric has structured and implemented OnTrack to address the needs of low-income customers while balancing financial, regulatory, and social interests.

The four primary operating objectives of the OnTrack program are to:

1. Improve customers' bill payment habits and attitudes;
2. Stabilize or reduce customers' energy usage;

² Actual OnTrack expenditures for 2022 were higher due to, among other things, increases in the price-to-compare.

3. Eliminate overdue balances for program participants; and
4. Provide the customer with other beneficial services and/or programs through a network of partner organizations.

3. Program Design

The OnTrack program is designed to establish a 12-month payment plan that complies with the CAP Policy Statement³ and maintains compliance with the specific parameters of the program.

OnTrack’s payment plan design is based around three payment options: (1) the Percent of Income (“PIP”) option, which will be available beginning August 9, 2023; (2) average bill and -(3) the Minimum Payment option. For each OnTrack participant, PPL Electric evaluates whether the PIP option or the Average Bill option will offer the best solution for the customer’s situation. These payment options are addressed in more detail below.

a. Percent of Income (PIP) Option

During the review process a Percent of Income (“PIP”) is calculated for each OnTrack applicant.

The table below shows the percent amounts that are used when the system calculates the PIP.

Income Level (Percent of FPIG)	Electric Heat	Non-Electric Heat
50% or Below	5%	2%
51 to 100%	6%	3.5%
101 to 150%	7%	4%

PPL Electric calculates the Total Energy Burden Payment Amount (“TEBPA”) under the PIP by multiplying the monthly income by the applicable percent of income percentage factor (see table above).

Below is an example calculation of the OnTrack installment amount using the PIP option.

³ 2019 Amendments to Policy Statement on Customer Assistance Program, 52 Pa. Code § 69.261-69.267, Docket No. M-2019-3012599.

PIP Option Example

Household Size	2
Monthly income	\$950
Electrically heated home	Yes
Percent of Income factor	6%
Total Energy Burden Payment Amount	\$57.00

b. Additional Conditions on Installment Amount

The following are other conditions that apply to the determination of a customer’s OnTrack installment amount:

1. The review process will not allow a payment amount to be lower than the minimum payment control feature of \$40 for electric heat customers or \$20 for non-electric heat customers.
2. A customer reporting zero income will participate in the program at the minimum payment amount of \$40 for electric heat customers or \$20 for non-electric heat customers.
3. If the customer exceeds the maximum CAP credit amount, the customer will be automatically transitioned to OnTrack Budget Billing (“OTBB”) status. The OTBB standing in the program is still beneficial because the customer receives debt forgiveness and OnTrack credits (if applicable), but the customer’s fixed monthly payment amount is increased from their normal OnTrack amount to their budget billing amount.
4. When an OnTrack customer moves from one residence to another, their OnTrack amount will be recalculated at the new address.
5. PPL Electric uses an alert process to identify a participant who has a TEBPA that is greater than the average bill. Specifically, PPL Electric runs a monthly report that will alert it to any OnTrack participants with an installment amount (i.e., OnTrack bill) greater than the average bill based on usage. A program specialist reviews the account, primarily usage history, and determines if an adjustment to the installment amount is needed. If the usage history is adequate and the average bill has gone down since enrollment, PPL Electric will reduce the installment amount. If the usage history is not adequate, but historical usage suggests that the installment

will fall below average, the installment amount may not be reduced. PPL Electric may also adjust installment amounts at a future review as customers continue to build usage history.

4. Program Eligibility

OnTrack offers qualified customers payments that are less than their current bills, arrearage forgiveness, and a chance for a fresh start with PPL Electric. In addition, the Company coordinates referrals with other low-income assistance programs, such as WRAP, Operation HELP, LIHEAP, as well as other programs administered by the partner organizations that administer OnTrack.

a. Eligibility Criteria

PPL Electric designed OnTrack specifically for low-income customers with household income at or below 150 percent of the FPIG who are unable to pay their electric service bills in full. Eligibility criteria for OnTrack include:

1. The household must be at or below 150 percent FPIG.
2. The household must submit a proof of income evidencing that they have a source of income or, alternatively, must submit the zero-income form explaining their income situation. PPL Electric will place a 30-day hold on collections activity if the OnTrack applicant is sent and asked to return a zero-income form. The Company will evaluate zero income claims by following the below listed guidelines. Additionally, the Company has the discretion to make exceptions to the guidelines for households based on specific circumstances.
3. The OnTrack application requires the customer to specify income, even if the income is unearned. Unearned income can come in the form of government assistance (temporary or long-term), public assistance grants, money from friends or relatives, and other one-time lump-sum payments. Additional examples include: (1) Temporary Assistance for Needy Families (TANF); (2) Diversion Program; (3) State Blind Pension Program; (4) Refugee Cash Assistance Program; and (5) State Supplementary Payments. Support payments that are actually paid to the household can be included if verified and documented as such. When a customer's only source of income is unearned income of this type, a self-declaration statement needs to be submitted with the OnTrack application. This self-declaration statement does not need to be

notarized. This statement allows the Company to verify how the customer is paying for basic living needs, such as food, shelter, personal items, etc.

4. The customer applying cannot own or be listed on multiple properties or multiple PPL Electric accounts. Exceptions can be granted for specific scenarios such as a property with a separate meter for a garage or a property with multiple meters.
5. The customer must permanently reside in PPL Electric's service territory. If PPL Electric or the partner organization finds the customer is not a full-time occupant of the property, the OnTrack application will be rejected.
6. The customer's account must be in an individual customer's name.
7. The customer's account must be billed on a residential rate; non-residential rate accounts are not eligible for OnTrack.
8. The customer's account must be on default service to complete the OnTrack enrollment.
9. The customer's account is not enrolled in a Time of Use ("TOU") rate.
10. The customer must contact PPL Electric or the partner organization if there is a change in household size and/or income.
11. The customer must provide updated proof of income when requested by PPL Electric or the partner organization.
12. The customer must respond to requests for information and/or appointments associated with WRAP.⁴
13. The customer must comply with all applicable PPL Electric tariff and regulatory requirements to establish and maintain electric service.

The OnTrack application requires verification from the customer acknowledging that the customer must report changes in income and household members. The customer also must provide confirmation that all information is true and accurate to the best of their knowledge. If an application is incomplete or requires clarification, the agency reviewing the application will make a reasonable attempt

⁴ If the customer is removed from OnTrack due to the failure to provide this response, the customer will be reinstated after providing such response.

to obtain the information necessary to determine eligibility or to clarify any issues which might disqualify the customer. If the customer does not respond to requests for additional information, or if PPL Electric or a partner organization finds that a customer is withholding information or did not comply with reporting all required documentation, the OnTrack application will be rejected.

If a customer with a security deposit on the account is determined to be eligible for OnTrack, PPL Electric will refund the security deposit to the customer with applicable interest via check or, with the customer's consent, through a credit applied to the customer's account balance. As part of obtaining the customer's consent to apply a credit to the account balance, PPL Electric will explain how that credit will impact the customer's monthly bill.

b. Determining and Calculating Income

All household members of an OnTrack applicant, regardless of relationship, are considered when determining household size and income. The earned and unearned income for minors (*i.e.*, household members aged 18 or younger) are excluded when determining OnTrack eligibility and benefits.

Pursuant to the Pennsylvania Department of Human Services' ("DHS") LIHEAP guidelines, income is the total earned and non-earned income of a household and includes the following:

1. Employee earnings: Employee earnings is money, including wages, salaries, bonuses, commissions, and tips, before taxes or other deductions that a person receives for providing services on behalf of an employer.
2. Profit from self-employment: Profit of a self-employed person is gross receipts minus costs of operating a business or farm, practicing a profession, providing day-care for children in an approved family day-care facility, or renting nonresident real property.
 - a. The following expenses are among those that are not deductible from gross receipts:
 - i. Depreciation.
 - ii. Personal business and entertainment expenses.
 - iii. Personal transportation.
 - iv. Purchase of capital equipment.
 - v. Payment on the principal of loans for capital assets or durable goods.

- vi. Work related expenses such as federal, state, and local income taxes, contributions to retirement funds and transportation to and from work.
 - vii. Deposits into the self-employed person retirement account and payment for his or her life insurance.
3. Income from roomers, boarders, or apartment renters: Gross income from providing room or board, or both or from apartment rentals paid directly to an adult household member.
4. Unearned Income: Unearned income includes, but is not limited to, the following:
- a. Public assistance grants.
 - b. Social Security benefits.
 - c. Workers' compensation (or disability).
 - d. Supplemental Security Income.
 - e. Unemployment compensation.
 - f. Support payments (child, foster care, spousal, etc.).
 - g. Cash gifts and contributions.
 - h. Pensions.
 - i. Interest and/or dividends from investment or bank accounts.
 - j. Veterans' benefits.
 - k. Funds withdrawn from Individual Retirement Accounts, Certificates of Deposit, and proceeds from the sale of stock certificates.
 - l. Utility Allowances paid directly to the household from the landlord or public housing agency to cover utility bills.
 - m. Income from nonresident rental property managed by a rental agency or another person.
 - n. Disability.
 - m. Money/income received from a family member or friend. This type of income must be documented with a verification statement. The statement does not need to be notarized.
 - n. Social Security Income or Social Security Disability received for a child.
5. Operational Losses: Operational losses from self-employment or losses associated with rental properties cannot be used to offset other forms of income.

The OnTrack applicant's proof of income may include pay stubs from employers, pay stubs from government organizations, self-declaration statements describing money received from family or friends, bank statement showing direct deposit information, or official tax return documents. If the customer is self-

employed or owns a small business, the income documentation must include a copy of the latest federal income tax return and net profit (not gross income), which will be used to determine eligibility for OnTrack. OnTrack applicants may provide proof of income for 30 days or 12 months, whichever is more beneficial and representative of their true annual income.

5. Enrollment and Referrals

PPL Electric has found that the primary source of potential OnTrack participants is referrals from the Company's Customer Service Representatives ("CSRs") and/or Customer Service contractors. CSRs have daily contacts with low-income, payment-troubled customers with overdue balances and routinely refer these customers to the partner organizations that administer OnTrack. During 2021, for example, CSRs generated approximately 148,000 referrals to OnTrack administering organizations.

PPL Electric developed an online application which was designed and created with the customer in mind. In addition to making applying easier for the customer, the process also shortens wait times by eliminating mailing delays with paper applications. The online application is available at: www.pplelectric.com/OnTrack.

The customer navigates through an intuitive series of screens providing the information necessary to determine eligibility into the OnTrack program. The customer has the option of uploading their proof of income or mailing this information to the agency who administers the program. The online system provides the customer with the name and contact information, including email address, for the assigned partner agency. The entire website and all assistance program applications are available in Spanish.

Other sources of potential participants may include internal lists, referrals made by partner agencies, LIHEAP-based data, and information from other PPL Electric programs.

There are multiple opportunities for enrollment in OnTrack. These options include the following:

1. During the payment assistance (phone call) interaction with the contact center if the customer appears to be a good fit for the program, the system will automatically alert the CSR, and a program application will be sent to the customer. The CSR will inform the customer that a program application is on the way.

2. The customer can call PPL Electric directly at 1-800-342-5775 and request an application for the OnTrack program or apply over the phone with an agent.
3. The customer can call a partner organization and request an application for the OnTrack program.
4. The customer can walk into the partner organization and complete a program application or ask for assistance completing the application.
5. The customer can apply online at www.pplelectric.com/OnTrack.

The Company will continue to evaluate new options for applying to the program and will move toward implementation when: (1) the costs are reasonable; and (2) the benefits align with improving the customer’s experience.

6. Projected Participation and Budget

PPL Electric will continue to work with internal and external resources to identify, engage, and enroll eligible customers. PPL Electric projects the following participation and expenditures for OnTrack from 2023 through 2027. Expenditure projections include the core component costs of revenue shortfall (OnTrack credits), arrearage forgiveness, and external administration. These expenditures do not include PPL Electric’s internal costs, such as employee expense items and IT system changes.

Program Year (as of the end of December)	Active OnTrack Households (Target/Estimate)	Projected Program Expenditures ⁵
2023	71,000	\$80,276,687
2024	73,250	\$73,578,322
2025	75,500	\$72,985,745
2026	77,700	\$72,599,144
2027	79,800	\$71,986,813

7. Needs Assessment

Matching the proper assistance program with each potential applicant is an overriding objective in PPL Electric’s administration of the Universal Service Programs. PPL Electric personnel, as well as its partner organizations, seek to ensure that eligible residential customers have an opportunity to successfully

⁵ Actual program expenditures could vary depending on energy prices, as seen in the actual expenditures for 2022. These projections were based on PPL Electric’s historical experience with energy prices.

maximize the benefits available to them via OnTrack, WRAP, Operation HELP, LIHEAP, and other related programs. Data on the Company’s customer base is noted below.

Average residential customer count	1,334,000
Estimated Low Income Customer Count	337,091
Confirmed Low Income Customer Count	228,117

8. Quality Control/Quality Assurance

a. Recertification

Within six months of the Commission’s Order entered February 9, 2023, PPL Electric will transition from an 18-month recertification cycle to a 12-month recertification cycle. PPL Electric will transition to a 12-month recertification cycle as follows:

- The current agreement timeline will remain at 18 months. Recertification will occur at the end of the 18-month period. If the customer should recertify early, this will make them eligible for the new 12-month timeline as well as the 24-month PPA Forgiveness timeline.
- The installment amount will change using the calculation based on new methodology of three options: (1) Percent of Income; (2) Average Bill; or (3) Minimum payment. The new installment amount is effective for future bills.
- Arrearage forgiveness for an existing customer on an 18-month recertification cycle will remain on the 18-month timeline.
- Maximum CAP credits for an existing customer on an 18-month recertification cycle will be based on the new shortfall limits.
 - o Those customers in an OTBB status will be reviewed to determine if they prematurely entered OTBB based on the new maximum shortfall limits.
 - o Those OTBB customers who fall below the shortfall limit will get a newly recalculated enrollment in the 12-month program. These customers will be eligible for the 24-month PPA Forgiveness timeline.
- A letter will be sent to existing customers on the 18-month recertification cycle explaining the changes mentioned above.
- Once these customers recertify, they will be placed in the 12-month program.

Under the 12-month program timeline, the recertification process begins at month 11. The system reviews OnTrack accounts to determine if they qualify for

automatic recertification. Accounts that qualify for automatic recertification are those that have received LIHEAP funds within the past 12 months or have SSI as the primary source of income. Accounts that meet the automatic recertification criteria will be recertified for another 12 months in the program at the same OnTrack installment amount. This automatic recertification feature will not occur two consecutive times. At month 12, accounts are reviewed again for automatic recertification. This second review is completed to identify any accounts that may have recently received a LIHEAP grant. OnTrack Budget Billing accounts are also eligible for automatic recertification if they have received LIHEAP in the last 12 months or have SSI as their primary source of income. When OTBB customers are automatically recertified, they will return into regular OnTrack at the conclusion of their 12-month program cycle.

At least 30 days before the recertification is due, a program cover letter and application are sent to customers who do not qualify for automatic recertification. The partner organization caseworker completes the recertification review for the customer and, if eligible, sets up the new OnTrack installment amount. A post enrollment letter with information about the program and the customer's payment amount is mailed or emailed to the customer. Customers remain enrolled in the program even after the pre-program arrears (overdue balance) have been forgiven.

In addition, there are special household situations where the Company will enroll a customer in OnTrack but require the customer to update their income information every six months instead of every 12 months. The Company refers to this special situation as OnTrack Lifestyle ("OTLS"). The purpose of OTLS is to address situations where customers' incomes are less than or equal to their mortgage payments or rent or they report zero income. In effect, the customers reported that they did not have enough income but somehow managed to pay their mortgage/rent and OnTrack payments. This gave rise to concerns that customers might not be reporting all sources of household income or other resources.

OTLS provides a check-up for the customer, which helps ensure that the Company is accurately documenting the customer's income situation and aligning the customer's payments with the most recent information.

Customers participating in OTLS are not eligible for automatic recertification. OTLS customers will be prompted to recertify after six months of participation. For participation beyond 12 months, customers will be required to provide additional evidence of eligibility, such as receipts, bank statements, and/or support letters, which provide an explanation as to how the customer is paying for cost-of-living expenses. The Company will not allow continued recertifications by self-declaring zero income or indicating their mortgage/rent is higher than income.

In addition, a customer may request to be removed from the OnTrack program at any time. PPL Electric will inform customers who request voluntary removal from the program after exceeding credit limits that they will be ineligible for any further credits until after the current 12-month program cycle has elapsed regardless of whether they stay in or leave. PPL will make these customers aware of the exceptions to the credit limits and what actions they should take if they qualify for these exceptions. Customers that voluntarily remove themselves from OnTrack can re-enroll within the 12-month period if they pay any in-program arrears.

b. Minimum Payment Amount and Maximum CAP Credits

The minimum payment control feature within the System will not allow a monthly payment amount to be less than \$40 for electric heat customers and \$20 for non-electric heat customers. The maximum 12-month revenue shortfall amount (also referred to as CAP credits or benefits) for electric heat customers and non-electric heat customers are shown in the table below:

FPL Tier/Level	Account Classification	Maximum Credit Amount That Could Be Used Over 12 Months
0% to 50%	Electric Heat	\$3,150
51% to 100%	Electric Heat	\$2,500
101% to 150%	Electric Heat	\$2,150
0% to 50%	Non-Electric Heat	\$1,950
51% to 100%	Non-Electric Heat	\$1,500
101% to 150%	Non-Electric Heat	\$1,250

Customers who are active in the program will have different revenue shortfall amounts each month because the actual revenue shortfall amount will be calculated by taking the actual bill amount minus the fixed OnTrack installment amount.

If a customer exceeds the maximum credit amount before the 12-month period expires, the customer will be automatically moved to OTBB program status. When this occurs, the OTBB activation letter is sent to the customer and informs the customer of this change in status. The OTBB activation letter also informs the customer that PPL Electric will automatically send a program application prior to their recertification/re-enrollment period. Recertification or re-enrollment will be considered 12 months from the original enrollment date in OnTrack, unless the customer has SSI as their primary source of income or they

have received LIHEAP in the last 12 months, in which case they will be automatically re-enrolled.

The customer will receive a letter when the pre-program arrears amount (overdue balance) is at zero. This point in time also corresponds with the recertification deadline. This letter, referred to as the *OTBB All Is Forgiven* letter, summarizes the customer's transition from traditional OnTrack to OTBB. The end of the letter states that the overdue balance has been eliminated, but PPL Electric still wants to help the customer by re-enrolling them in OnTrack at a payment amount that is lower than what they are currently paying. The customer is informed that a program application has been mailed to them.

PPL Electric may exempt a household from maximum CAP credit or consumption limits if one or more of the following conditions exist: (1) the household experienced the addition of a household member; (2) a member of the household experienced a serious illness; (3) energy consumption was beyond the household's ability to control; (4) the household is located in housing that is or has been condemned or has housing code violations that negatively affect energy consumption; or (5) energy consumption estimates have been based on consumption of a previous occupant. OnTrack customers who have reached 50% and 80% of their maximum OnTrack credit will be sent communication letters about contacting PPL Electric regarding these possible exemptions to the maximum CAP credits. PPL Electric will file and serve copies of these communication letters within three months of the Commission's Order entered on February 9, 2023, at this docket.

PPL Electric also will track and report the number of customers who exceed their credit limit annually and are placed into OTBB in the preceding year. Beginning in 2024, PPL Electric will file and serve the report at this docket by April 1 each year through the duration of the USECP.

c. Collections and Service Termination

The Company designed the OnTrack program with the idea of balance in mind. PPL Electric believes the energy burden reduction needs to be balanced against the need to hold limited-income customers accountable for making on-time payments. The Company's billing system runs on a chronological billed, due, review cycle. Actual payments received are woven into this cycle to determine how to treat the account. In practice, this means the system bills the customer, waits for the due date, and then reviews the account to see if any additional actions are needed based on what was billed versus payments received. The billed amount is also shown as the Amount Due on PPL Electric's bill. Once a customer is enrolled in OnTrack, the Customer Service

Billing system will expect a payment for the OnTrack installment amount, plus any missed installments when the review occurs.

If an active OnTrack customer does not catch up on their installments during the billing/collection process, the electric service may be terminated for nonpayment.

A customer will enter the collection process after one missed payment unless the missed payment is less than \$60. If the customer misses two or more payments, they will enter the collection process regardless of the amount of the missed payment. Additionally, if the customer is placed into the collection process it may lead to electric service termination during non-moratorium months. If an active OnTrack customer's service is terminated for nonpayment, the reconnection amount will be equal to the missed OnTrack installments due plus the reconnection fee. Once reconnected, the customer will resume participation through the end of their enrollment period.

The Company has messaging in place to remind customers of the benefits of paying the bill by the due date. Five (5) days before the due date, the Company's system will deliver a short reminder phone call to the customer. In addition, if the customer misses one payment, a letter is sent and informs the customer about the missed payment. This letter also discusses the collection process and having the electric service terminated.

In addition, a customer may request to be removed from the OnTrack program at any time. PPL Electric will inform customers who request voluntary removal from the program after exceeding credit limits that they will be ineligible for any further credits until after the current 12-month program cycle has elapsed regardless of whether they stay in or leave. PPL will make these customers aware of the exceptions to the credit limits and what actions they should take if they qualify for these exceptions. Customers that voluntarily remove themselves from OnTrack can re-enroll within the 12-month period if they pay any in-program arrears.

d. Fraud and Theft of Service

PPL Electric views theft of service as a serious public safety issue. In cases of theft of service, the customer may be placing their household in an unsafe condition.

The Company will investigate any OnTrack account where PPL Electric becomes aware of potential fraud, theft of service, or other misappropriation of funds.

When reviewing OnTrack applications for enrollment or re-certification, PPL Electric may review the application for potential fraud or misrepresentation of

information (e.g., validate suspected occupants, investigate inconsistent household/demographic information provided during the application process, theft of service, “name-game”, etc.).

As part of PPL Electric’s standard revenue protection practices, customer information may be analyzed for potential fraud. The investigation may include a rate check, a credit reporting service to confirm a customer’s debt at a location, soft credit inquiry, and a probe into how the customer pays for basic living expenses. If the investigation includes the use of credit report information, PPL Electric will provide the customer with adverse action notification in accordance with the Fair Credit Reporting Act.

Fraud includes, but is not limited to, misrepresentation of the customer’s identity for the purpose of obtaining utility service or OnTrack benefits, misrepresentation of income or occupant information, tampering with PPL Electric’s equipment, or otherwise obtaining service illegally. PPL Electric will follow its normal practices for investigation of fraud, theft of service, and other misappropriations of service which may result in some or all the following: back billing, removal from OnTrack and termination of service.

Customers will have 20 days to dispute any findings of fraud before adverse action is taken by PPL Electric. Once an account is removed from OnTrack for fraud, theft of service, or other misappropriations of service, the customer will not be eligible to receive OnTrack benefits for one full year from the date of removal. Customers may also be held liable for account arrearage forgiven amounts, pre-program arrearages, bill credits, and/or related account collection and investigation fees.

e. Cost Tracking

PPL Electric will take the following steps if its actual annual OnTrack costs exceed the projected budget for that year by more than 20%:

- Notify all parties to the 2023 USECP proceeding and its Universal Service Advisory Committee (“USAC”) by or before March 1 of the following year and provide actual annual OnTrack cost information for the preceding year.
- Schedule a meeting (virtual or in-person) with all interested stakeholders within 30 days of this notification to discuss the costs and receive input on cost controls.
- File and serve a petition at the 2023 USECP docket proposing additional cost control measures or a letter justifying why no additional cost control

measures are needed within 30 days of the stakeholder meeting but no later than April 30th.

9. Miscellaneous

a. Financial Posting Order for LIHEAP Funds and OnTrack Credits

PPL Electric is an authorized LIHEAP vendor. The Company receives and posts LIHEAP funds to customer's accounts. DHS has determined that utilities cannot use LIHEAP cash grants to offset the costs of OnTrack credits (i.e., the difference between actual bills and OnTrack payments). PPL Electric posts LIHEAP credits in accordance with the LIHEAP vendor agreement. At the time of this filing the financial posting order for LIHEAP cash or crisis grants is as follows:

- Missed OnTrack payments
- Current OnTrack bill due
- Payment of future OnTrack bills

If DHS makes changes to future vendor agreements, PPL Electric will follow compliance with program guidelines.

b. Overpayments

The Company's billing system runs on a chronological billed, due, review cycle. The system bills the customer, waits for the due date, and then reviews the account to see if any additional actions are needed based on the payments received. If the customer makes the scheduled payments, the account balance continues to reduce through arrearage forgiveness credits. In cases where the payments exceed the balance of the account, the system is designed to create an OnTrack Overpayment ("OTOP") excess credit. The OTOP credit is created when current or accumulated balance overpayments for an active OnTrack customer cause the account balance to be reduced to less than \$0. Example: A customer has an OnTrack installment amount of \$100, and the account balance is \$55. The customer pays \$100. The system will create an OTOP credit of \$45 (\$100 - \$55). This \$45 OTOP credit will be applied to the future Pay This Amount (scheduled payment), as shown on the customer's bill.

c. Shopping for Electric Generation Supply

PPL Electric found that customers who were enrolled in OnTrack and shopping were paying rates higher than non-shopping customers and exhausting their OnTrack credits more quickly. This has a negative impact on the shopping

OnTrack customers who are not able to maximize their OnTrack benefit, and other customers who are funding OnTrack through the USR. PPL Electric received approval in its Default Service Plan V to require customers to terminate their shopping contract prior to being accepted into the OnTrack program.

Customers who apply for OnTrack and have an energy supplier go through the traditional application and income review process. If the customer is eligible for the program, the enrollment is approved in a pending status. The customer is mailed a letter advising of their approval and alerting the customer to proceed with the enrollment they need to return to default service. On day 7, if the customer has not returned to default service and has provided the Company with an email address, a reminder communication is sent. On day 15, if the customer has not returned to default service, the application is rejected, and a rejection letter is mailed. Customers may reapply once they have returned to default service.

d. Resource Plan

PPL Electric uses a combination of internal resources, contractors, and partner organizations to manage and deliver the OnTrack program. A list of the current partner organizations is set forth in Appendix B.

e. Final Billing

For an OnTrack customer’s final bill, the Company will either charge the established OnTrack installment or the actual tariff rate, whichever is more advantageous to the customer. If the final bill includes remaining unforgiven pre-program arrearages, the amount of pre-program arrearages will be separately identified on the final bill. Moreover, if a customer establishes service at a new account within 30 days of the prior account’s finalization, PPL Electric will transfer the OnTrack agreement to the new account.

f. Summary of Differences Between Current Plan (2017-2019) and Proposed Plan (2023-2027)

The table below provides a description of the key program design changes.

ID #	Category	Current Plan (2017-2022)	Proposed Plan (2023-2027)
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1	Program Design	18 Month Program	12 Month Program
2	Program Design	<p>Percent of bill payment structure: 0-50% = 50% 51%-100% = 70% 101%-150% = 80%</p> <p>5% - non-heating (0-50% FPIG) 6% - non-heating (51%-100% FPIG) 7% - non-heating (101%-150% FPIG) 13% - heating (0-50% FPIG) 16% - heating (51%-100% FPIG) 17% - heating (101%-150% FPIG)</p>	<p>Change primary payment option from Percent of Bill to Percent of Income plan. The percent of income amounts are based on the application of the new energy burden thresholds:</p> <p>2% -non-heating (0-50% FPIG) 3.5% -non-heating (51%-100% FPIG) 4% -non-heating (101%-150% FPIG) 5% - heating (0-50% FPIG) 6% - heating (51%-100% FPIG) 7% - heating (101-150% FPIG)</p>
3	Program Design	<p>Minimum Payment Amount</p> <p>\$12.00 – non-heating \$30.00 – heating</p>	<p>Minimum OnTrack Amount</p> <p>\$20.00 – non-heating \$40.00 – heating</p>
4	Program Design	<p>Customers with arrearages had a \$5.00 monthly arrearage co-payment included in their OnTrack installment</p>	<p>Eliminated the \$5.00 arrearage co-payment</p>
5	Program Design		<p>OnTrack payment reviews are completed to confirm the customer does not have a payment amount that is greater than the average bill.</p>
6	Program Eligibility		<p>Eligibility criteria includes:</p> <ul style="list-style-type: none"> • Time of Use customers are not eligible • OnTrack applicants confirmed eligible for enrollment must return

			to Default Service if they have a Supplier
7	Quality Control – Quality Assurance	18-month program with an automatic recertification for customers that have received LIHEAP funds withing the past 16 months or have Supplemental Security Income (SSI) as the primary source of income.	Change program timeline to a 12-month program. Recertification guidelines are: 6 months for OTLS One automatic recertification for customers who have received LIHEAP with in the past 12 months or have Supplemental Security Income (SSI) as the primary source of income.
8	Quality Control – Quality Assurance	Electric Heat: 0%-50% = \$4,027 51%-100% = \$3,661 101%-150% = \$3,328 Non-electric Heat: 0%-50% = \$1,585 51%-100% \$1,441 101%-150% = \$1,310	Maximum OnTrack credit amounts are updated as follows: Electric Heat: 0%-50% = \$3,150 51%-100% = \$2,500 101%-150% = \$2,150 Non-electric Heat: 0%-50% = \$1,950 51%-100% \$1,500 101%-150% = \$1,250
9	Default Design	If a customer missed two or more installments, they were removed for non-payment (also referred to as defaulted).	A customer no longer defaults after missing two or more installments, instead the customer will be in Active Collections for their missed OnTrack installments.
10	Control Features	There is no specific language in the plan to address the handling of concerns relating to inaccurate, incomplete, or fraudulent applicants.	Update information regarding fraud protocols.