**BEFORE THE
WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION**

WASHINGTON UTILITIES AND
TRANSPORTATION COMMISSION,

                        Complainant,

    v.

PUGET SOUND ENERGY, INC.,

                        Respondent.

**Docket No. UE-072300
Docket No. UG-072301**

**SECOND EXHIBIT (NONCONFIDENTIAL) TO THE
PREFILED REBUTTAL TESTIMONY OF
BOOGA K. GILBERTSON
ON BEHALF OF PUGET SOUND ENERGY, INC.**

JULY 3, 2008

Stopped Meter Process

Introduction

OVERVIEW

What

This guide is intended to provide training on the Stopped Meter process and the work performed in ConsumerLinx (CLX) and in the field.

Who is potentially involved?

- Customer Access Center Agents
- Corporate Billing
- Gas and Electric Field Personnel

OBJECTIVE

After completing this training, you will be able to:

- Understand the Stopped Meter process.
- Process a Stopped Meter correction within CLX from start to finish.
- Assign and enter Stopped Meter data into the Zero Consumption database.

LIST

The following topics will be discussed in this lesson:

- ✓ Definition of a Stopped Meter
- ✓ The Roles of the Access Center and Corporate Billing work groups
- ✓ Steps for assigning and completing Stopped Meter information in the Zero Consumption database
- ✓ Steps for performing a Stopped Meter adjustment in CLX
- ✓ Final steps for processing

Stopped Meter Process, Continued

What is a Stopped Meter?

A Stopped Meter is a meter that is not registering the accurate amount of gas or electricity at a particular location.

Ways Stopped Meters are Identified:

- A Customer reports that they are not being billed for gas or electric charges yet they are using the service.

- A Customer Access Agent notices a zero consumption billing when speaking with a customer and questions if this is valid.

- Gas or electric Field Personnel notice that the dials on the meter are not spinning but the service is being used.

- While Periodic Meter Exchanges are performed in the field it is found that the removed meter was not registering usage.

Role of the Access Center:

When an Access Center Agent recognizes a non-registering or stopped meter they will follow the following process:

- Warm transfer the call choosing the "Non Registering Meter" drop down option in Aspect. **Note**: *Attempt to warm transfer customer, yet avoid holding for more than 1 minute.*

If wait times are more than 1 minute:

- Queue a task to CAC-BOBQ with the Customer's name and contact phone number. Include an internal comment on the account that the customer is aware of the stopped meter.

Stopped Meter Process, Continued

Role of Corporate Billing:

- Receive transferred calls from CAC regarding stopped meters.

- Schedule Meter Exchanges related to stopped meters.

- Perform Stopped Meter adjustments in CLX.

- Assign and complete Stopped Meter information in zero consumption database.

- Contact customers to advise of adjustments and negotiate arrangements and/or settlements on accounts.

Steps for Assigning and Completing Stopped Meters in Zero Consumption Database:

1. Open folder **J:\CORPORATE BILLING\STOPPED METER PROCESS\Zero Consumption A03.mdb**.

2. Click the **Agent Log In** button

3. Enter your **User Name** and **Password**

4. Click on the **Normal Menu** button

5. Enter the Service Order Number located to the right of the screen

6. Click the **Assign Service Order** search button

7. Select your name from the **Assign To Agent** field

8. Click on the **Assigned Date** field (defaults to Today's date).

9. Review the order in CLX to determine if a back bill is required.

Stopped Meter Process, Continued

STEP BY STEPS

continued

Steps for Assigning and Completing Stopped Meters in Zero Consumption Database, continued.

10. Select a choice from the **Is Back Bill Required?** field *based on the answers in the **Is Back Bill Required?** field, follow the steps below:*

✓ **Yes**
Process adjustment in CLX. **Go to step 11.**

✓ **No**
Add comment to Non-Registering comment field and file paperwork.
Click **Close** to return to the Main Menu**.**

✓ **Meter Exchange Schedule**
Add **Exchange Meter** service order in CLX.
Attempt to contact the customer to schedule the Meter Exchange.
If unable to contact the customer:
1. Schedule the order 14 days out
2. Comment in CLX
3. Print the service order
4. Attach red tag and place in Waiting for Service Order in box.
5. Click **Close** to return to the Main Menu

Note: If a customer's name and address are not listed on the Service Order in the database copy, paste this information from CLX.

11. Click on the **Save** button to return to the Main Menu.

12. Click the **Ready to Process** button to the left of the main menu screen under **My Work Queue.** Scroll through **Ready to Process** records to locate the Service Order that requires entry of adjustment data.

13. Enter the following information to the database:
- Bill To
- Bill From
- Therms/KWH
- Bill Amount
- Copy Client comments from CLX to CLX Comment Field

Stopped Meter Process, Continued

Steps for Assigning and Completing Stopped Meters in Zero Consumption Database, continued.

*If you are forwarding this record to a **Caller Work Queue,** follow the steps below:*

continued

- ✓ Click the **FWD To Call Maker** field. (This will enter a date in the field)
- ✓ Click **Close** to Save and return to the Main Menu.
- ✓ Keep the file until a caller is assigned and retrieves the information.
- ✓ Caller will return paperwork to processor once negotiations completed.
- ✓ Place paperwork in **Waiting for Statement** folder.
- ✓ Once the **Tickled Statement** is received review it for accuracy.
- ✓ Place the entire file in the **Letters to be Sent** folder. A letter will be mailed to the customer.

*If not forwarding this record to a **Caller Work Queue**, follow the steps below:*

- ✓ Click **Close** to return to the Main Menu. This will store the record in the **Ready for 1st Call** folder of your Work Queue.
- ✓ Review your **Ready for First Call** folder for accounts that have been processed and the first call attempt is not completed.
- ✓ Attempt to contact the customer and click **1st Call Completed**.

  If the customer is not reached:

  - o Click **Close** to return to the Main menu
  - o Wait 4 business days before re-attempting call

  If the customer is reached:

  - o Enter the information in the appropriate fields (Write-off Amount, Resolved Date, Resolved By)
  - o Add installment arrangements for the entire balance and enter the information in the **Tickler Comments** section of CLX.
  - o Place the entire file in the **Letters to be Sent** folder. A letter will be mailed to the customer.
  - o Click **Close** to return to the Main menu.

Stopped Meter Process, Continued

STEP BY STEPS

continued

Steps for Assigning and Completing Stopped Meters in Zero Consumption Database, continued.

If a Second Call Attempt is necessary:

✓ Review your **Ready for Second Call** folder for accounts that have been processed and the first call attempt completed.
✓ Attempt to contact the customer.
✓ Click **Call 2 Completed**.

If the customer is not reached:

o Add installment arrangements for the entire balance and enter the information in the **Tickler Comments** section of CLX.
o In the Zero Consumption database, click on the **Send No Response Letter** button under your work queue.
o Place paperwork in the **Waiting for Statement** folder
o Once the **Tickled Statement** is received review it for accuracy.
o Place the entire file in the **Letters to be Sent** folder. An Admin will draft and mail the letter.

If the customer is reached:

o Enter the information in the appropriate fields. (Write-off Amount, Resolved Date, Resolved By).
o Add installment arrangements for the entire balance and enter the information in the **Tickler Comments** section of CLX.
o Place paperwork in the **Waiting for Statement** folder.
o Once the **Tickled Statement** is received review it for accuracy.
o Place the entire file in the **Letters to be Sent** folder. An Admin will draft and mail the letter.

Stopped Meter Process, Continued

Steps to process a Stopped Meter Adjustment in CLX

1. Obtain Service Order from file.
2. Locate Service Order in CLX
   - Complete service order
   - Perform **Meter Exchange**
3. Determine if back bill is required.
4. Go to Stopped Meter worksheet (**Note**: Verify if in correct mode: mult. 1, mult. 10 or gas).

On the stopped meter worksheet:

1. Fill in customer information.
2. Enter read dates (starting with the meter exchange date continue down until the "from date" of rebill is entered)
3. On the last line in column C (reads) enter "Starting Meter Read"
4. Enter the previous history.
✓ If working an electric adjustment, enter the bill to dates and average per day from the **Period Usage** tab in **Product Assignment** folder of CLX.
✓ If working a gas adjustment, adjustment of the BTU Factor is required. Follow the steps below:
   - Go to **Product History Inquiry Measured Usage** tab
   - Look for prior year's dates (i.e. if you are working May 2007 you are looking for May 2006).
     - **Option 1:** Take the average per day divided by the BTU factor. This is the amount entered in the worksheet for CCFS in previous history.
     - **Option 2:** Take the Turnup divided by the Days in Period. This is the amount entered in the worksheet for CCFS in previous history.
   - After all previous history has been entered go to the used column and enter the lowest CCFS for each month. This will now calculate the reads.

Stopped Meter Process, Continued

Steps to process a Stopped Meter Adjustment in CLX

From the Product Assignment Folder in CLX:

continued

1. Go to **Meter Events** tab and double click on the designated meter.

2. Navigate to the **Meter Events** tab and follow the steps below:
   - o Browse the first read that is going to be removed
   - o Check the **Invalid** box
   - o Click **OK**
   - o Repeat until all reads to be removed are invalid (**Note:** CLX will only allow 6 reads to be invalidated or added at a time)
   - o **Save**

3. From the **Meter Events** tab, enter the estimated reads from the worksheet.
   - o Click on **Add**
   - o Read type = **Estimated**
   - o **Date** is from the worksheet
   - o Enter **Time**
   - o Enter read from worksheet
   - o Event source = **Manual**
   - o Enter your **Employee ID#**
   - o Click **OK**
   - o Repeat steps above entering all reads

Stopped Meter Process, Continued

Steps to process a Stopped Meter Adjustment in CLX, continued

continued

Rebilling an Account in CLX:

Note: Before rebilling an account, check to see if customer is on the Budget Payment Plan. If yes, you will want to remove them from the plan before rebilling.

1. Begin at the **Product Assignment** folder in CLX

2. Note the "From" and "To" date for the rebilling

3. Record the old and new Meter number, Exchange date and Service Order number.

4. From **Product Assignment**, go to **Task**

5. Click on **Correct Service Product Charge**

6. Click **OK**

7. Enter in the correction date range "From" date.

8. Enter the reason for the rebill: **Stopped Meter**

9. Enter in the description box:
   ✓ *"STOPPED METER (meter #) re: (address) rebilled (from – to dates). Per (service order #) New meter #XXXXXX as of (exchange date). Used history from (years used for previous history) to estimate usage ….. (name)*

10. Copy the comments from the description box.

11. Click on **SAVE**.

Stopped Meter Process, Continued

STEP BY STEPS

continued

Steps to process a Stopped Meter Adjustment in CLX, continued

If any billing segments have pended, follow the steps below:

- ✓ From the **Product Assignment** folder, go to **Collectibles**
- ✓ Right click on the Pended segment
- ✓ Pick **Resolve Charge Problems** and left click. (**Note**: This will take you to the resolve charge problem screen. The charge problem message # will most likely be "4240 allowed number of estimated reads has been exceeded.")
- ✓ Problem resolution = **Approve Charge**
- ✓ Click on **Save**
- ✓ Repeat for each billing segment that is pended.

12. Enter Client Comments at the **Product Assignment** level. These are the comments you copied from the description box when rebilling the account.

13. On the Bill Detail form
    - o Enter customer information
    - o Enter meter numbers
    - o Fill in original and corrected data. To find this information from **Product Assignment**:
        - ▪ Click on **Product History Inquiry**
        - ▪ Go to **Period Usage** tab

    Note: First date listed on bill detail is the most recent "bill to" date. The last date placed on the detail is the "bill from" date for the oldest billing period rebilled.
    The difference amount on the bottom of the detail should equal the rebill amount.

Tip: If the account bills out again, before the customer has been contacted, you will want to adjust the detail to include this information. This will ensure that when the bill is sent the difference equals the statement amount for the product involved.

Stopped Meter Process, Continued

Steps to process a Stopped Meter Adjustment in CLX

14. Back at the **Product Assignment** folder, update client comments with the following remarks: *"Correction resulted in debit of $X.XX."*

15. Go to the **Statement Account** and Tickle the statement to yourself. If billing out in less than 10 business days place both printed and online tickle on account so bill will not print before customer is contacted.

continued

Final steps

1. Go to database and fill in the bill detail page (refer to database instructions)

2. Place completed adjustment (bill detail, worksheet, service order) in the blue **Ready for a Caller** folder.

3. Once customer has been contacted, the caller will return the adjustment packet to you and it will be placed in the red **Waiting for Statements** folder.

4. Once statement is received, review for accuracy and make any adjustments needed to the bill detail. Print two copies of the bill detail and place packet in green **Ready for Letters** folder.

Stopped Meter Process Map

WHERE AM I?

The diagram below represents the Stopped Meter Process from initiation to resolution.

Stopped Module Process

Steps to process a Stopped Module Adjustment in CLX

1. Obtain Service Order from file.
2. Locate Service Order in CLX
   o Complete service order
3. Determine if back bill is required.
4. Go to Stopped Module worksheet (**Note**: Need to determine which worksheet to use **With History** or **Without History**).

On the stopped module worksheet:

- Note if there is prior history for the customer use the **With History** worksheet and if there is no prior history for the customer use the **Without History** worksheet.

If using the **With History** worksheet

1. Enter read dates (starting with the meter/module exchange date continue down until the "from date" of rebill is entered)
2. On the last line in column E (reads) enter "Starting Meter Read"
3. On the first line in column F enter "Ending Meter Read"
4. In column B enter the prior years average CCFS per day for each billing period
5. In column C enter the # of days in each billing period. This will now calculate the reads.

Note: On the first line the read in column E should match the read in column F if not you will need to make some adjustments to column B until column E matches column F.

If using the **Without History** worksheet

1. Enter read dates (starting with the meter/module exchange date continue down until the "from date" of rebill is entered)
2. On the last line in column E (reads) enter "Start Meter Read"
3. On the first line in column G (Actual Read) enter "End Meter Read"
4. In column B enter the % of yearly usage that corresponds to the month from the list on the right side of the worksheet. This will now calculate the reads.
5.

Note: For billing periods less than 30 days you will need to calculate the % for the # of days in the billing period. For example:
If you have a billing period where the % would be 15% for 30 days and you only have 5 days in that period. You would take the 15% divided by 30 days multiplied by 5 days multiplied by 100 to get the % for the 5 days. (.15/30=.005*5=.025*100=2.5%)

Stopped Module Process, Continued

continued

Steps to process a Stopped Module Adjustment in CLX

From the Product Assignment Folder in CLX:

1. Go to **Meter Events** tab and double click on the designated meter.

2. Navigate to the **Meter Events** tab and follow the steps below:
   - o Browse the first read that is going to be removed
   - o Check the **Invalid** box
   - o Click **OK**
   - o Repeat until all reads to be removed are invalid (**Note:** CLX will only allow 6 reads to be invalidated or added at a time)
   - o **Save**

3. From the **Meter Events** tab, enter the estimated reads from the worksheet.
   - o Click on **Add**
   - o Read type = **Prorated**
   - o **Date** is from the worksheet
   - o Enter **Time**
   - o Enter read from worksheet
   - o Event source = **Manual**
   - o Enter your **Employee ID#**
   - o Click **OK**
   - o Repeat steps above entering all reads

Note: Do not invalidate the start or end reads that you entered on the worksheet.

Stopped Module Process, Continued

STEP BY STEPS

continued

Steps to process a Stopped Module Adjustment in CLX, continued

Rebilling an Account in CLX:

Note: Before rebilling an account, check to see if customer is on the Budget Payment Plan. If yes, you will want to remove them from the plan before rebilling.

1. Begin at the **Product Assignment** folder in CLX

2. Note the "From" and "To" date for the rebilling

3. Record the Meter number, Exchange date and Service Order number.

4. From **Product Assignment**, go to **Task**

5. Click on **Correct Service Product Charge**

6. Click **OK**

7. Enter in the correction date range "From" date.

8. Enter the reason for the rebill: **Meter Malfunction**

9. Enter in the description box:
   - ✓ *"STOPPED MODULE (meter #) re: (address) per (service order #) rebilled (from – to dates) reads prorated based on actual manual read on (exchange date)….. (name)*

10. Copy the comments from the description box.

11. Click on **SAVE**.

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Stopped Module Process, Continued

Steps to process a Stopped Module Adjustment in CLX, continued

continued

12. Enter Client Comments at the **Product Assignment** level. These are the comments you copied from the description box when rebilling the account.

13. On the Bill Detail form
    - o Enter customer information
    - o Enter meter numbers
    - o Fill in original and corrected data. To find this information from **Product Assignment**:
        - ▪ Click on **Product History Inquiry**
        - ▪ Go to **Period Usage** tab

    Note: First date listed on bill detail is the most recent "bill to" date. The last date placed on the detail is the "bill from" date for the oldest billing period rebilled.
    The difference amount on the bottom of the detail should equal the rebill amount.

Tip: If the account bills out again, before the customer has been contacted, you will want to adjust the detail to include this information. This will ensure that when the bill is sent the difference equals the statement amount for the product involved.

14. Back at the **Product Assignment** folder, update client comments with the following remarks: *"Correction resulted in debit of $X.XX."*

15. Go to the **Statement Account** and Tickle the statement to yourself. If billing out in less than 10 business days place both printed and online tickle on account so bill will not print before customer is contacted.

Stopped Module Process, Continued

Final steps

1. Go to database and fill in the bill detail page (refer to database instructions)

2. Place completed adjustment (bill detail, worksheet, service order) in the blue **Ready for a Caller** folder.

3. Once customer has been contacted, the caller will return the adjustment packet to you and it will be placed in the red **Waiting for Statements** folder.

4. Once statement is received, review for accuracy and make any adjustments needed to the bill detail. Print two copies of the bill detail and place packet in green **Ready for Letters** folder.

NON-REGISTERING METER (NRM) PROCESS OVERVIEW

This process flowchart outlines the steps involved from the identification of an NRM to it's resolution.

START07

PHASE A

IDENTIFY NON-REGISTERING METERS (NRM) & GENERATE SERVICE ORDERS (S/O) TO DETERMINE CAUSE OF ISSUES

PHASE B

RECEIVE & LOG COMPLETED S/O's

PHASE C

PERFORM BILLING CORRECTION (IF NECESSARY)

PHASE D

CONTACT CUSTOMER, RESOLVE WITH CUSTOMER, SEND STATEMENT & DOCUMENTATION TO CUSTOMER, & ARCHIVE DATA

END
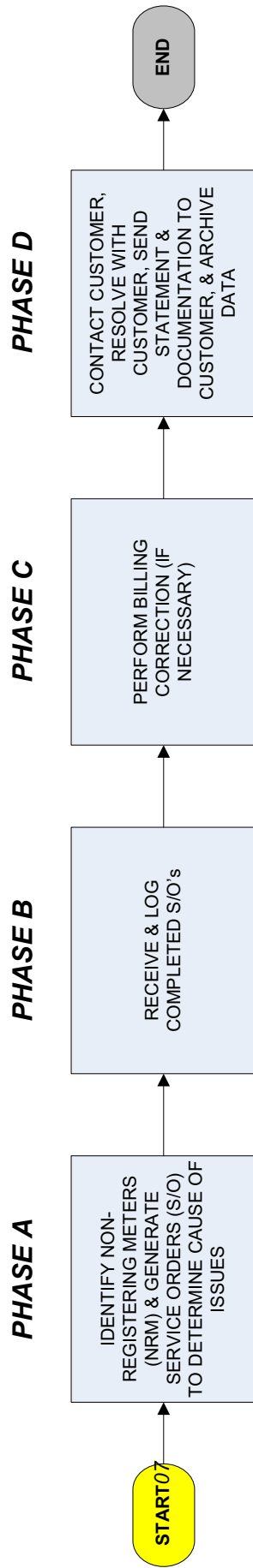
PHASE A - NON-REGISTERING METER (NRM) PROCESS

Identify non-registering meters & generate service orders to determine cause of issues (done by multiple departments.)

Customer

START (1)

(1.1) Identifies potential issue & contacts CAC

Customer Access Center (CAC)

(2.1) Transfers call to CB NRM team

Corporate Billing Department (CB)

(3.1) S/O to exchange METER (& not MODULE for cust. Initiated). Meter type: **ELECTRIC, GAS,** or **PRESSURE GAS?**

(3.2) Creates NRM investigation paperwork & files as "Pending"

(3.3) Business Analyst (BA) updates SM D/B with data from new report

(3.4) Additional filters applied. Notifies MNS BA (Nancy Mesquita) when done.

START (3)

(3.5) CB identifies NRM in course of regular business. Is meter **ELECTRIC/GAS** or **PRESSURE GAS?**

(3.6) Does it appear to be a **MODULE** or **METER** issue?

(3.7) Queues task to NREG work queue for METER exchange

(3.8) METER exchange S/O generated

(3.9) Queues task to CORP work queue for MODULE exchange

(3.10) MODULE exchange S/O generated

Metering Network Services (MNS)

START (2)

(4.1) **WEEKLY:** Zero Consumption Report (ZCR) & Stopped Meter database (SM D/B) update report run

(4.2) MNS BA selects Product Assignments (P/A's) to generate S/O's for

(4.3) MNS supervisor (Theresa Burch) generates S/O's through MDL

(4.4) Module tested. Is it **GOOD** or **BAD?**

(4.5) Exchanged in field. Is this S/O a Mobile Workforce **(MWF)** S/O or a **STANDARD** S/O?

(4.6) S/O paperwork sent to CB Mail (Sharon Smith)

(4.7) **BEGIN PHASE B1**

Gas First Response (GFR)

(5.1) METER exchanged. Is this S/O a Mobile Workforce **(MWF)** S/O or a **STANDARD** S/O?

(5.2) To aggregate MWF queue

(5.3) To Corporate Billing's NRM MWF work queue

(5.4) **BEGIN PHASE B2**

Other involved departments involved

(6.1) **Industrial Meter Operations Dept (PRESSURE METERS):** Meter Exchanged & sent to Repair & Calibration Dept (meter shop) for testing

(6.2) **Repair & Calibration Dept (R&C) (meter shop):** Receives meter & orange ticket

(6.3) **R&C:** Tests meter according to schedule

(6.4) **R&C Dept:** Results of meter test indicated on orange ticket & forwarded to Energy Measurement (EM)

(6.5) **Energy Measurement Dept (EM):** forwards orange ticket to CB. **Does billing correction if Charted Meter (Route 96)**

Electric/Gas

Meter

Module

Pressure Gas

Electric

Gas

Pressure Gas

Standard

Bad

Good

MWF

Standard

MWF

PHASE B - NON-REGISTERING METER (NRM) PROCESS

Receive & log completed service orders (done by Corporate Billing NRM group)

(7.9) **Back to Phase A step:** "CB: S/O to exchange METER. Meter type ELECTRIC, GAS, or PRESSURE GAS?

(7.8) BEGIN PHASE C

(7.10) Completed in SM D/B & handed off to Clerk, who files as COMPLETED

(8.7) **[1] Access Issues:** Cust. contacted & S/O scheduled & generated. Paperwork filed as PENDING. LOWER PRIORITY

(8.9) **[2] PRESSURE METER:** billing correction to be completed by Sr Agent or Business Analyst

(7.7) **[3] "Further Investigation Necessary"**: Agent determines one of the following 3 options: **A.** Go ahead & do correction; **B.** Generate S/O for METER to be exchanged*; **C.** No correction necessary, file as complete

(7.13) **[4] Non-Customer Initiated:** For AMR S/O's where module was bad & a billing correction is necessary

[5] Customer Initiated: S/O's where customer is aware of an issue. HIGH PRIORITY

(7.11) END

(8.11) "Valid 0": paperwork filed as COMPLETED

(8.6) Access Issues

(8.8) Bad METER (not MODULE). **Is it a PRESSURE Meter?**

(8.10) "Need more info"

(7.5) END

(7.4) Paperwork filed as COMPLETED

(8.4) Enter information into SM D/B & distribute accordingly. There are 4 types of scenarios as follows:

(7.3) **"Valid 0's":** Clerk enters VEE code into SM D/B

(7.6) **"Unknown":** more information needed to determine issue. Clerk enters into SM D/B & files into "Further Investigation Necessary" folder

(7.12) **"Bad Module":** 1) Enter into SM D/B 2) Complete BLUE non-Cust Initiated form & attach to S/O 3) Forward on to "Non-Cust. Initiated" folder

(8.3) Match printout with investigation documents filed as "Pending". **Is this documentation missing?**

(8.5) Fill out RED "Customer Initiated" form & staple to S/O

(7.2) AMR NRM-related S/O: sorted into 3 different types as follows:

(7.14) Non-AMR NRM-related S/O

(8.2) Print out S/O & Complete CLX task

(7.1) Corporate Billing Mail in-box (Sharon Smith). **AMR NRM-related S/O or non-AMR NRM-related S/O?**

(8.1) Corporate Billing Mobile Workforce (MWF) NRM work queue

(4.7) BEGIN PHASE B1

(5.4) BEGIN PHASE B2

YES

NO

AMR-related

Non-AMR related

YES

NO

B

A

C

PHASE C - NON-REGISTERING METER (NRM) PROCESS

Perform billing correction (done by Corporate Billing NRM Processor)

(9.5) **BEGIN PHASE D**

(9.4) Complete bill detail spreadsheet

(9.3) Cancel old reads & enter estimated/pro-rated reads into CLX & re-bill

(9.2) 3 Steps:
1) Retrieve usage history
2) Enter usage data into spreadsheet
3) Acquire estimated reads to be used for billing correction;

(9.6) Enter data into spreadsheet to acquire the pro-rated reads to be used for the billing correction

METER

MODULE

(9.1) Review account & determine billing correction method. NR **MODULE** or NR **METER**

(7.8) **BEGIN PHASE C**

PHASE D - NON-REGISTERING METER (NRM) PROCESS

Contact Customer, resolve with Customer, send statement & documentation to Customer, & archive data (done by Corporate Billing NRM group.)

Caller

(9.5) **BEGIN PHASE D**

(10.1) Pull up investigation in Stopped Meter Database (SM D/B), assign to yourself, & review. Is there a phone number for customer?

NO → (10.6) Attempt to acquire Customer's phone number. Was it found?

YES → (10.2) Contact Customer. Were we able to contact them?

NO → (10.8) Note CLX & SM D/B that Customer was called.

YES → (10.3) Review issue with Customer. Is it resolved?

YES → (10.4) Add installment arrangements (if necessary), offcycle (if necessary), & fill out yellow & pink forms

→ (10.5) Drop off paperwork in Processor's Waiting For Statement folder (WFS)

NO → (10.10) Inform supervisor (if necessary). Continue to attempts to resolve with Customer.

(10.9) Call customer back in 4 days. Were we able to contact them?

YES → (10.3)

NO → (10.11) Is billing correction for $500 or more?

YES → (10.12) Call customer several more times. Were we able to contact them?

YES → (10.3)

NO →

(10.7) NO RESPONSE LETTER: complete Green form, add installment arrangements, & offcycle statement

Processor

(11.1) Statement arrives. Processor gives statement & other investigation paperwork to Letter Writer

Letter Writer

(12.1) Complete the letter

(12.2) Note CLX, close out investigation in the SM D/B

(12.3) Send letter, statement, & bill detail to Customer

(12.4) Attach copy of letter to investigation documentation & give to Clerk

Clerk

(13.1) Receive investigation documentation

(13.2) File documentation as COMPLETE

(13.3) END OF NRM PROCESS

Lost Meter Process

Introduction

What

This guide is intended to provide training on the Lost Meter process and work performed in CLX and the field.

Who is potentially involved?

- Customer Access Center Agents

- Corporate Billing

- Customer Construction Services

- Gas and Electric field personnel

To gain a better understanding of what a Lost Meter is and the process from start to resolution.

The Following topics will be discussed in this lesson:

✓ Definition of and Identification of a Lost Meter

✓ Common Causes of Lost Meters.

✓ The Roles of the Access Center, Customer Construction and Corporate Billing groups.

✓ Steps in the Lost Meter process for Corporate Billing.

Lost Meter Process, Continued

What is a Lost Meter?

A Lost Meter is a meter that has been installed at a residential or commercial dwelling, in excess of 45 days or more, without the data entry in CLX completed.

Ways Lost Meters are identified:

- Customer calls into the Customer Access Center inquiring on lack of billing statement for newly constructed residence or business.

- Customer Construction locates paperwork on new meter set.

Common Causes of Lost Meters

✓ Paperwork for meter installation is not received from Service Provider.

✓ Service Providers installing meters without formal paperwork on hand. This can result in the non-completion of the data entry process within CLX.

Lost Meter Process, Continued

Access Center Role:

1. When a customer calls inquiring on the absence of a statement for a new home or business, the Agent will determine if the meter can be categorized as a "Lost Meter":
   - If the customer has taken possession of a newly constructed residence or business for **more than 45 days**, the meter information may be lost if it has not been loaded into the CLX for that location.

2. If the meter has been determined to be a possible Lost Meter, the Agent will send a queued task with the consumer information listed below to the designated Customer Construction Services Agent or Organization Unit for the appropriate area.

   - **Address**

   - **Meter #**

   - **Current Read**

   - **Date of possession**

An updated listing of the Customer Construction Services agents is listed in the QRM under: http://pseweb/qrm/CustomerConst/LostMeters.asp

Note: It is not necessary to request a service order for a Field Investigation for meter information on Lost Meters.

Lost Meter Process, Continued

Customer Construction Role:

- If necessary, the Customer Construction Agent will send service orders to check or verify the meter in the field.

- After meter information is confirmed, a CCS Agent will load the meter and reassign the product assignment with the consumer information that the Customer Access Center Agent has provided.

- A CCS Agent will tickle the statement to Corporate Billing for processing of the customer letter.

- When applicable, the Agent will send an email to Corporate Billing to charge the product.

Lost Meter Process, Continued

Corporate Billing Role:

A Corporate Billing Agent will follow the steps below:

1. Charge the product assignment when necessary. **Note**: We only backbill for 3 years. If the meter adjustment goes back further than 3 years, it is necessary to void the statement and only charge for a maximum of 36 months.

2. Review the bill to make sure it is indeed a Lost Meter. (Hint: _____ is there a helpful hint to add here?)

3. Generate a customer letter and enter the client comments listed below:

   "Lost Meter #_____ re: (address) per (contact person), the meter was set (date), billed from (start date – current bill date). Charge resulted in a $XX.XX debit. Mailed letter with statement."

4. Make copies of the bill and letter for filing.

5. Mail the letter and bill to customer.

6. End the tickled statement in CLX.

7. Enter the information listed below in the Lost Meter database:

   - ✓ Enter each meter as a separate item in the entry form
   - ✓ Assign Lost Meter to yourself
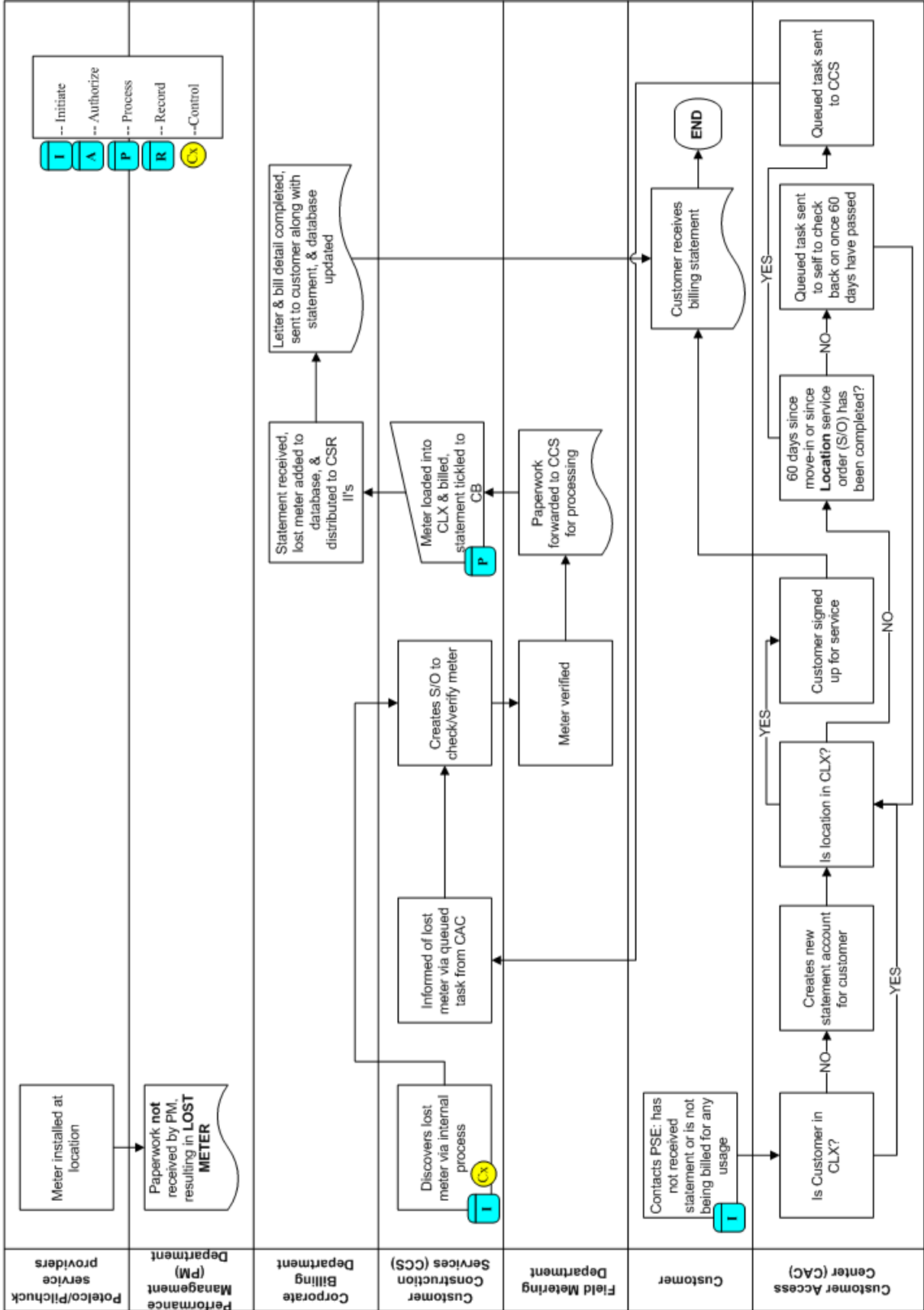   - ✓ Mark date completed and enter billing information in Agent work queue

Lost Meter Process Map

WHERE
AM I?

The diagram below represents the Lost Meter Process from initiation to resolution.

Lost Meter Process Flowchart

This process map outlines the steps taken from the installation of a meter that becomes 'lost', through the resulting billing correction

Legend:
- I -- Initiate
- A -- Authorize
- P -- Process
- R -- Record
- Cx --Control

Swimlanes (departments):
- Poletco/Pilchuck service providers
- Performance Management Department (PM)
- Corporate Billing Department
- Customer Construction Services (CCS)
- Field Metering Department
- Customer
- Customer Access Center (CAC)

Process steps:
- Meter installed at location
- Paperwork **not** received by PM, resulting in **LOST METER**
- Statement received, lost meter added to database, & distributed to CSR II's
- Letter & bill detail completed, sent to customer along with statement, & database updated
- Meter loaded into CLX & billed, statement tickled to CB (P)
- Paperwork forwarded to CCS for processing
- Creates S/O to check/verify meter
- Meter verified
- Informed of lost meter via queued task from CAC
- Discovers lost meter via internal process (Cx / I)
- Customer receives billing statement
- END
- Contacts PSE: has not received statement or is not being billed for any usage (I)
- Is Customer in CLX?
- Creates new statement account for customer
- Is location in CLX?
- Customer signed up for service
- 60 days since move-in or since **Location** service order (S/O) has been completed?
- Queued task sent to self to check back on once 60 days have passed
- Queued task sent to CCS

Unassigned Energy Usage (UEU) Process

Introduction

OVERVIEW

What

This guide is intended to provide training on the UEU process and work performed in CLX and the field.

Who is potentially involved?

- Customer Access Center Agents

- Corporate Billing

- Gas and Electric field personnel

OBJECTIVE

After completing this training you will be able to:

- Gain a better understanding of the UEU process

- Understand the roles of the Access Center and Corporate Billing

- Process a Customer Information Form

- Process a UEU customer letter

- Process UEU return mail

LIST

The following topics will be discussed in this lesson.

- ✓ Definition of Unassigned Energy Usage (UEU)
- ✓ Common causes of UEU
- ✓ The Roles of the Access Center and Corporate Billing work groups
- ✓ Steps for processing a Customer Information Form
- ✓ Steps for processing UEU Customer Letter
- ✓ Steps for processing UEU Mail Return

KEY IDEAS

What is Unassigned Energy Usage (UEU)?

Unassigned Energy Usage is when a customer is using gas or electric services and is not signed up for service.

WARNING

Common Causes of UEUs

- Customer moves to a new location and forgets to call us to set up service.
- Customer is renting and believes that the landlord is taking care of gas / electric service
- Gas and electric locations are not combined in CLX causing one to be assigned to the customer and the other one remaining unassigned.
- Customer has been cut out of a location in error by PSE.

KEY IDEA

Role of the Access Center:

If a customer calls the CAC and states that they have been residing in or have possession of a location and have not been being billed for it. The CAC agent will:

- Complete the move in process. Carefully negotiate for responsibility for as much past usage as is fair and reasonable.

- Offer Installment arrangements for the same amount of time the customer accepts the usage.

- If customer refuses installment arrangements, enter a client comment, "Client declined arrangements for UEU billing"

KEY IDEA

Role of Corporate Billing:

- Process Customer Information Forms (CIfs)
- Process UEU mail return
- Update disconnect service orders when 48 hr notices are left
- Complete Disconnect Service Orders
- Create Disconnect Service Orders Manually
- Receive calls from UEU customers and field personnel on special UEU support line

How to process a CIF

- Find or Add **PRODUCT ASSIGNMENT**
- Click **LOCATION** and put in the address on the **CIF** and click *find*.
- Check **PERIOD USAGE** tab to see if there has been usage the entire UEU time. (**we do not start billing with zero usage**)
- Note the **CIF** with the start date (from the CIF listed as *Move In Date*) and the end date (last date in the *TO DATE* column)
- Highlight the 1st address line and go to **CONSUMER**
- Complete **MOVE IN** as usual,
- When setting up the **UEU** account put requested by**: UEU CUSTOMER INFORMATION FORM (do not abbreviate)**
- Add Installment payment plan: This needs to be the same # of months that the back bill is for. Put down requested by **UEU CUSTOMER INFORMATION FORM**
- Write down on the CIF the **SIX** things that need to be filled in on the letter, which are; the **total amount billed, the service type, the from and to date, monthly installment amount, and the SPA amount.** You will need this when sending out the letter.
- Tickle the bills to **CAC-UEUR (OR) UEUC-BOT O1G**, in the comment box type **ATTACH WITH UEU INSTALLMENT LETTER.**
- End Tickler (use date within 30 days or before next statement)

Deposits for new customers

- Charge deposits for all commercial customers
- Charge deposits for residential customers that are renting and deposit if the employment section on the CIF is blank, or lack of information on the CIF.

Deposits for existing customers

- Use regular deposit rules

How to generate a UEU Customer Letter

From Product Assignment:
- Copy **ADDRESS**
- **Task – Add Communication Event**
- Distribution method – Mail
  Requested Items tab – *INCLUDE* , Type **UEU** in Communication Item field and click *FIND*, highlight line #4: **UEU INSTALLMENT PAYMENT ARRANGEMENT LETTER** and *ATTACH.*
- **Subject tab – Select** INCLUDE **button**
- **Paste** ADDRESS **in** LOCATION **field and click *OK***
- Variables tab and click *VIEW VARIABLES* button – There are 6 things that will need to be filled out **(you should have this written on your CIF).**
- Tickler Requests tab – **PSE-CAC-UEUR or UEUC** then click *OK*

How to process UEU mail return

- Double click on PROCESS RETURNED MAIL and type the COMM EVENT # in the yellow box.
- Click GET DATA

Fill in blue fields:

- RETURNED DATE = USE TODAY'S DATE OR DATE ON BIN
- REASON = OTHER
- ACTION TAKEN = RESENT
- COMMENTS = FIELD DELIVERY
- COPY Address

Go to Product Assignment

- Check PERIOD USAGE TAB. If there is ZERO usage, set aside and note.
- Otherwise, note AT A GLANCE. With DATE AND UEU RETURN MAIL TO FIELD. *IMPORTANT: IF THERE IS ALREADY A NOTE ON "AT A GLANCE" FROM A PREVIOUS RETURNED MAIL, APPLY THE STICKER "2*ND MAIL RETURN, IF NO ONE ANSWERS PLEASE DISCONNECT"
- Write meter # and UEU date on envelope (start date of PSE).
- Double-click on LOCATION (on side)
- Check blue box "Directions to Locations" and note any directions on envelope.
- Go to PRODUCTS/USAGE POINTS tab. Double Click
- Go to Usage Point tab. Double Click.
- Double-click on the 3rd (bottom) COMPANY METERED USAGE POINT on side) and check both METER LOCATION and READ INSTRUCTION tab. Note the instructions on the envelope. (all you need are the code #'s)
- Double-click on the 3rd (bottom) COMPANY METERED USAGE POINT on side) and check both METER LOCATION and READ INSTRUCTION tab. Note the instructions on the envelope. (All you need are the code #'s)

Unassigned Energy Usage Process Map

The diagram below represents the UEU Process from initiation to resolution.

Unscheduled Energy Usage (UEU) Flowchart

This process map outlines the steps taken from use of energy on an un-assigned service location to the sign-up or disconnection of service at the location

ConsumerLinx (CLX)

- UEU report generated (weekly)
- UEU letter auto-generated and mailed to customer
- UEU disconnect threshold met?
  - NO → (loops back)
  - YES → Service Order (S/O) for disconnect auto-generated
- Customer receives statement → END

Customer

- START: Uses electric/gas service but not signed up for service
- Mail returned to PSE as undeliverable?
  - NO → Did customer respond?
    - YES → Customer signed up for service...
  - YES → Returned undeliverable mail received
- Disconnected Customer calls to re-connect
- END

Corporate Billing Department (CB)

- Paperwork forwarded to field for "Sign or Disconnect"
- Customer signed up for service. S/O for re-connect generated (if necessary). Installment Arrangements letter generated (if necessary)
- Disconnect paperwork received & processed

Meter Network Services

- Receives paperwork
- Distributed to staff
- "Sign or Disconnect" visit. Did customer sign up for service?
  - YES → Phone call back to CB to inform them of sign-up
  - NO → Does location appear to be Occupied or Vacant?
    - VACANT → SERVICE DISCONNECTED
    - OCCUPIED → 48 hour notice left. Did customer sign up within 48 hours?
      - NO → SERVICE DISCONNECTED
      - YES → (loops back)