

JOINT PSE/LIAC DISCUSSION
TO COMPLY WITH DOCKET UG-230470 ORDER 02

Order 02

- Continue CCA low income prioritized credits flag and Tier 6 of BDR through December 1, 2024 for pre-qualified customers who have not self-attested
- Parties to submit an agreed upon outreach method to the Commission before September 13, 2024
- If no agreement then outreach to pre-qualified customers who have not self-attested will be:
 - ◆ Direct mail notice by 9/27/2024 AND
 - ◆ Direct mail notice by 10/25/24 AND
 - ◆ Phone call if past due in last 24 months

September 5th PSE/LIAC Discussion/Proposal:

- ◆ Current count of active pre-qualified customers to receive outreach and the BDR/CCA extension to December 1, 2024 is 46,966
- ◆ OUTREACH MESSAGING
 - ◆ PSE and the LIAC will jointly craft two outreach messages to be included in e-mail, postal mail letters and postcards.
 - ◆ Joint messaging will include details on when and what will be changing for customers, including cost estimates of benefits for average summer/winter gas bills, and messaging that we don't want customers to lose out on these valuable savings and instructions to enroll. Post cards will include co-branding with agencies if approval is granted to use the agency logo
 - ◆ PSE and LIAC will record agreement on the outreach messaging in a joint meeting in time to prepare the printed materials
- ◆ MAILED OUTREACH TIMING
 - ◆ Starting 10/2/24 all pre-qualified customers with an e-mail address on file who have agreed to receive email communications will receive the agreed upon outreach message via e-mail
 - ◆ Starting 10/4/2024 all pre-qualified customers with active accounts who have not yet completed a self-declaration will receive postal mail in the form of a letter (note that postal mail takes time so this would be completed by 10/18/24)
 - ◆ Starting 11/6/24 all pre-qualified customers who have not yet completed a self-declaration will receive a post card in the mail, which will include co-branding with the local CAP agency and further information on how to apply with a QR-code linking to

Puget Sound Energy
P.O. Box 97034
Bellevue, WA 98009-9734

pse.com

pse.com/discount (note that post cards also take time so this would be completed by 11/15/2024)

◆ **PHONE CALL OUTREACH TIMING**

- ◆ Starting immediately after approval of this proposal, PSE will begin phone calls to all pre-qualified customers that are currently past due (estimated 6,800 customers), starting with the largest past due amounts
- ◆ After the first round of calls is completed, PSE will move to calling a second round for pre-qualified customers that have not yet enrolled and have been past due anytime in the past 12 months (counts TBD)
- ◆ As a last resort for any pre-qualified customers who have not yet enrolled or been reached, starting November 18th PSE will create an automated outbound call informing customers of when the temporary enrollments expires, how to apply to continue receiving credits/discounts and/or call PSE's Customer Care Center. These final calls will be completed no later than November 22nd.

The Energy Project

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