

PSE Low Income Advisory Committee
Meeting Agenda

MS Teams - Conference Call

Tuesday June 10th, 2025

10:00AM – 12:00PM

Safety Moment	10:01 - 10:05 Suzanne Sasville
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Language Access Plan	10:05 - 10:45 Theresa Burch
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Order 04 and Schedule 111 Low Income Definition	10:45 - 11:15 Valerie Newman/ Theresa Burch
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Disconnection Policies Review & Post Phase 5 Disconnections	11:15 - 12:00 Nicole Eagle
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Additional topics for discussion from members?

Close meeting

Next meeting July 8 10:00AM – 12:00PM

PSE's Disconnection Practices



Disconnections Compliance Requirement

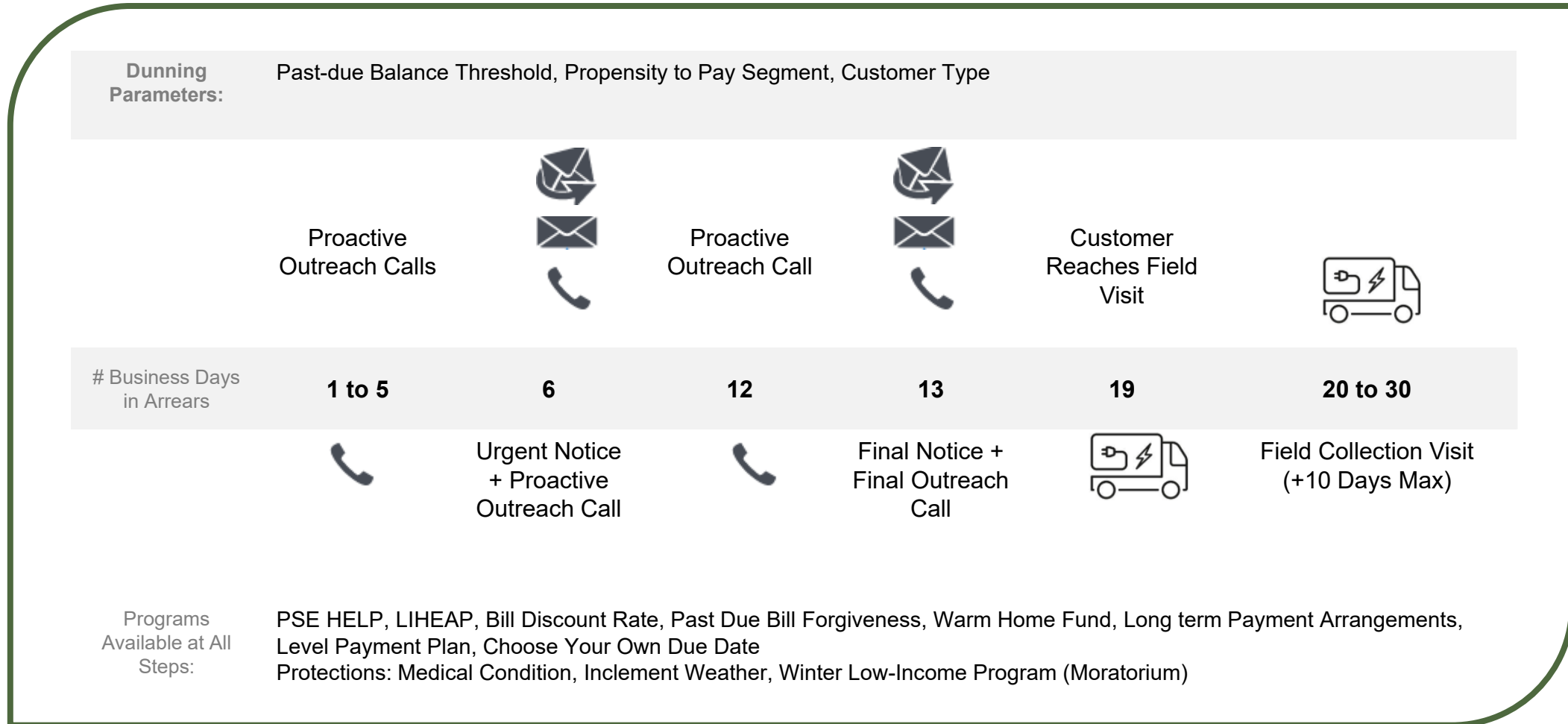
From Commission's Order from PSE's 2024 General Rate Case*
(***bolded for emphasis***)

*While the Commission acknowledges PSE's acceptance of TEP's to **review its disconnection practices in consultation with LIAC and the EAG** we are not ordering PSE to comply with any specific timelines as recommended in TEP's testimony. However, we do require PSE to **submit a letter to the Commission documenting its collaboration with these advisory groups within six months** of the date of this order.*

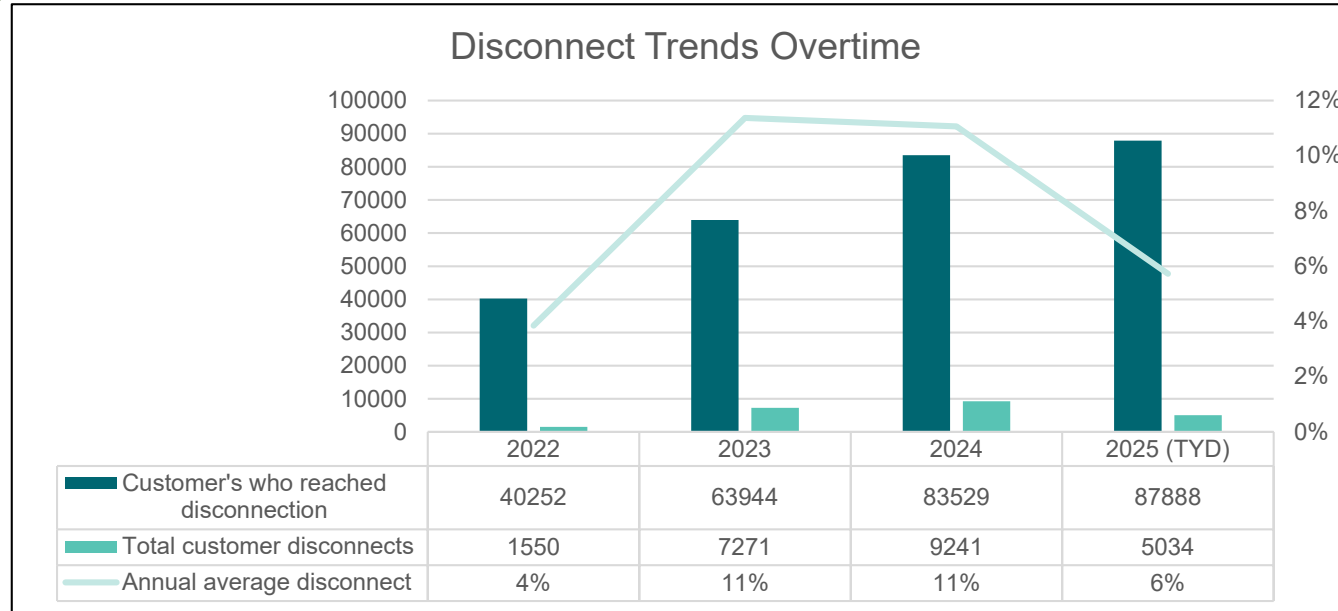
Compliance letter due: July 15, 2025

* PSE GRC Docket UE-240004 et al Final Order 09/07 (January 15, 2025) ¶180

PSE's Targeted Outreach on Past-Due Balances



Disconnect Data



HELP given throughout 2022-2025:

2022 PY- \$14,252,294, served 26,280 customers

2023 PY- \$20,625,670, served 30,871 customers

2024 PY- \$55,096,250, served 74,979 customers

2025 PY YTD- \$42,963,694, served 65,289 customers; February forecasted total \$106,339,442

Phased dunning program

Phase 1- \$1,000 or more past-due all customers, excluding known and estimated low income (from Nov 21-July 24)

Phase 2- \$1,000 or more past-due all customers, including known and estimated low income (July 24)

Phase 3- \$750 or more past due all customers, including known and estimated low income (Nov 24)

Phase 4- \$500 or more past-due all customers, including known and estimated low income (Dec 24)

Phase 5- \$250 or more past-due all customers, including known and estimated low income (May 25)

PSE Customer Survey: Disconnection Process

Survey Question	Survey Result
Did you recall receiving any disconnection notices from PSE?	60% said yes
What disconnection notices did you receive? (select all that apply)	Mail, email, notice on door
Did you contact PSE to take any actions to avoid disconnection?	62% said to learn about ways to avoid disconnection
Why didn't you contact PSE?	<ul style="list-style-type: none">• Didn't have time• I had lost my job and had no money to try and pay some of the balance
How easy or difficult was it to get your service reconnected?	50% said very easy
How could the disconnection/reconnection process be improved	<ul style="list-style-type: none">• It was actually a really stress less experience• I had zero issues, it was easy and quick

Disconnecting a Customer

Disconnections are highly regulated. There are many policies and procedures PSE must follow before considering a disconnect.

Is there any feedback PSE should consider regarding disconnection practices, where applicable outside of a policy change?

Some ideas:

1. Different outreach engagement during the dunning process?
2. Anything you can think of that we may consider to try and reach more customers?

PSE Field Visits



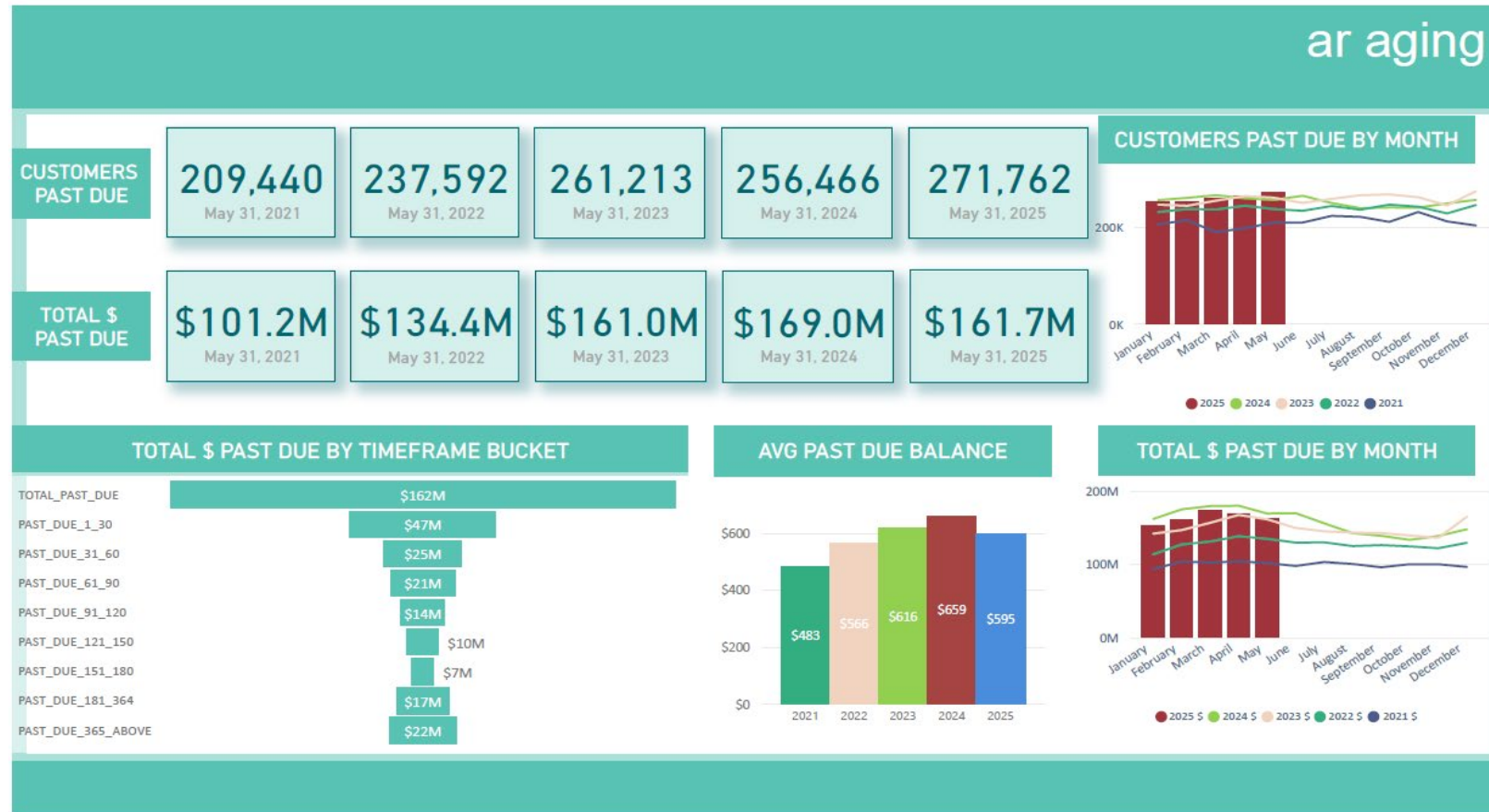
Field Collection Visits

- Resuming back to normal field operations
 - One field visit, where applicable
 - Remote disconnects 'may' occur without a visit, where applicable
- **ZERO** changes for known low income customers or medical condition customers
 - A visit will still be made to customers who are known low income, medical emergency in last 24 months, as outlined in our AMI rulemaking or by CETA for low income definition.

Appendix



Customer Arrearages Over Time



Comparison:

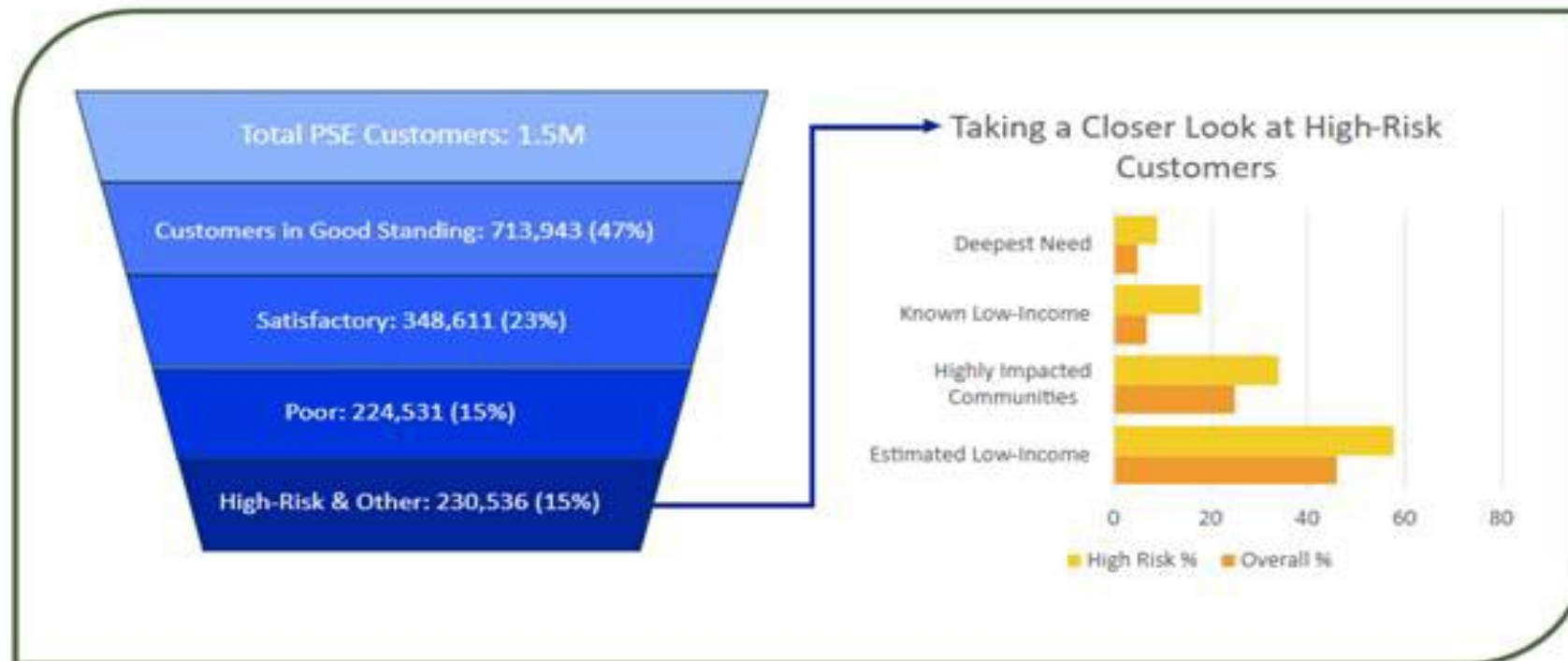
May 31, 2019
219,502 customers
in arrears
\$53.1M in arrears

•24% increase in
customers in
arrears

•67% increase in
dollars in arrears
PSE Arrearage

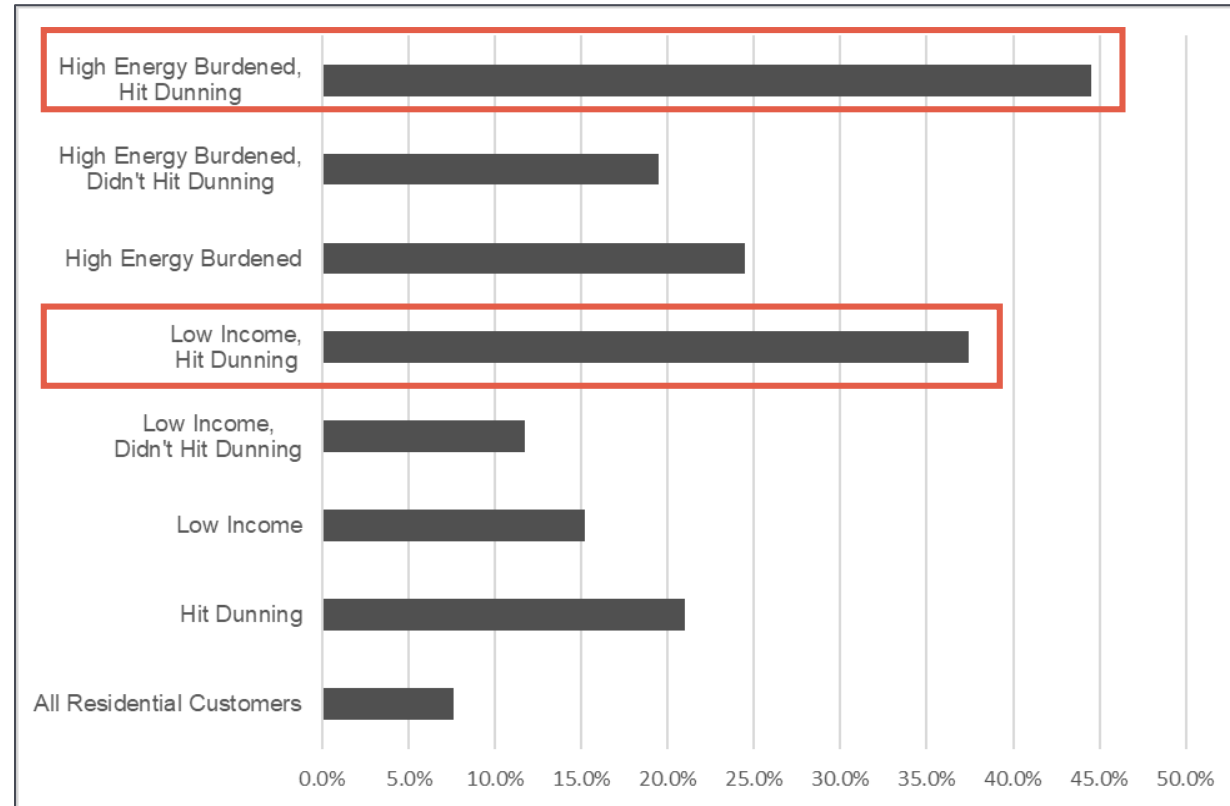
PSE's Propensity to Pay Model

Majority of Customers have high propensity to pay



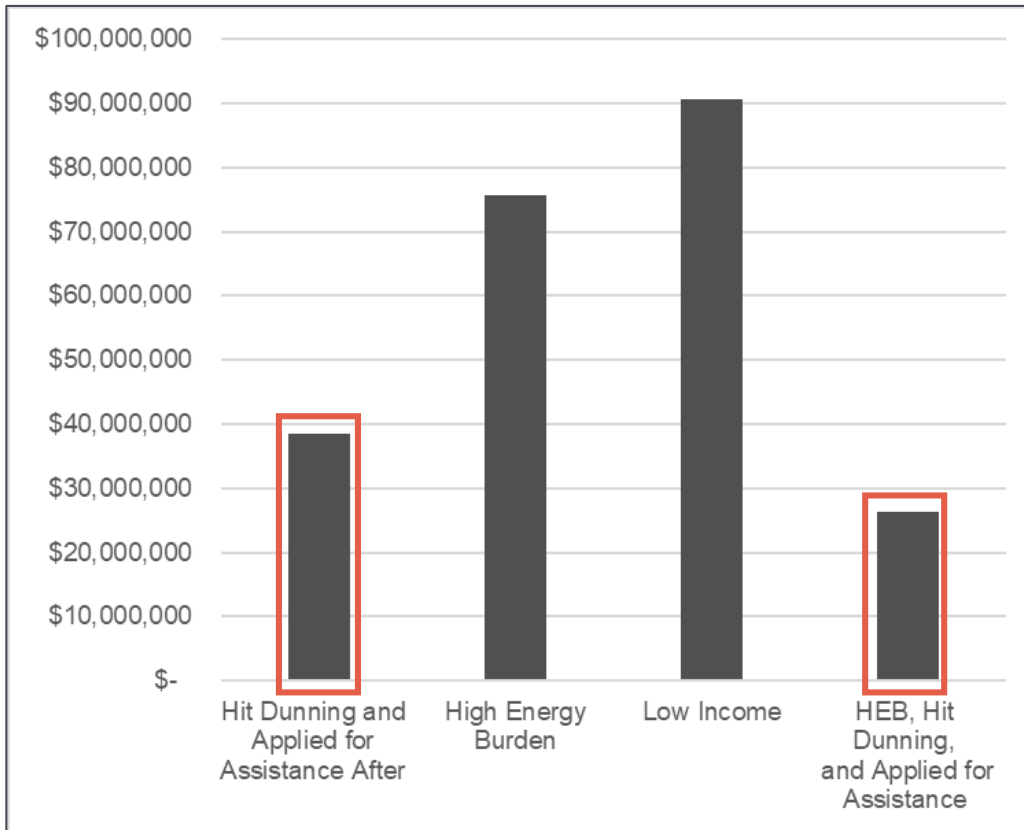
Percentages of Customer Groups who Applied for HELP / BDR and were in Dunning in Last Year

- Certain customer groups are more likely to apply for assistance
- Entering dunning is associated with higher likelihood of application, especially for low income or energy burdened customers
- For example, high energy burdened customers who enter dunning are over twice as likely to seek assistance as those who do not enter dunning
- This pattern strongly indicates that entering dunning acts as an incentive to apply for assistance



The share of annual household income used to pay annual home energy bills. RCW 19.405.020(17). High energy burden (HEB): WA Department of Commerce's threshold for determining an energy burdened customer is a customer whose energy burden is greater than 6%

Energy Assistance Given to Various Groups in Past Year (HELP, BDR, LIHEAP)



Among customers who went into dunning and then applied for assistance, nearly \$40M in assistance (BDR, HELP, LIHEAP) has been given in the past 12 months (* for some customers, a portion of this assistance could have occurred before entering dunning)

Note – customer categories overlap, so funding is not cumulative

6.10.25 LIAC Meeting Transcription notes

Attendees:

Sasville, Suzanne
Newman, Valerie
Eagle, Nicole
Burch, Theresa
Meredith Neal
Roberts, Andrew (UTC)
Cook, Corey (UTC)
Wallace, Carol
Manzini, Diane
Wang, Yvonne
Daniela Romo
Melissa Gong
Jean Marie, She/Her/Hers, Public Counsel
Marie Stanley
Charlee Thompson
Shaylee Stokes
Yakupova, Kelima
Bevington, Sara
DeBell, Michelle (COM)

Transcript

June 10, 2025, 5:08PM



Burch, Theresa 0:03

So good morning everybody. Happy Tuesday.

Thanks for joining us for this kind of off cycle meeting. I feel like Suzanne's safety moment was pointed directly at me.

I'm actually quite burned.

You can't really tell on the camera.

I did not follow the rules over the weekend and I did not drink enough water and as a result I am burned and I did not feel well yesterday.

So heed those warnings.

That's really important, especially those of us who aren't used to heat.

So I'm going to give a relatively brief update on the language access plan.

And raise your hand if you have any questions.

Hopefully I'll see it.

Or Valerie.

Or Suzanne can let me know.

So starting off with a little bit of data.

Pse customers who prefer language other than English.

Our estimates are that we have about 131,000 or 8 1/2 percent of our residential customers that don't speak English as their primary language. Kind of our top languages. There are Spanish, Mandarin, Russian, Vietnamese, Korean or Hindi. And of those 131,000, about 52,000 of them are in our estimated low income.

Group and then on the right here I just pulled some translation stats.

Well, I didn't pull it. One of our Uber analysts pulled it for calendar year 2024, calls that requested translation coming into our call center.

So you can see that Spanish is very, very much at the top here.

One thing I noticed looking year over year is that the total calls coming in.

For each of those kind of top five languages.

Has gone up a little bit each year.

Like for example, Ukrainian was down probably 10th or 11th and it's kind of slowly moved up a little bit to where now it's our fourth most requested. But again far and above anything else is the Spanish request for translation.

So this came from the Washington State Office of Financial Management.

And I know it's a little bit blurry.

It was kind of hard to copy off the website, but just to give you an idea.

Of our state in general, so the darkest counties on there are the ones that have the highest percentage, 42 to 51% where the household speaks a language other than English.

So for PSE those are, you know, King and Snohomish are our top two.

Obviously Snohomish is gas, but King, you know, we have gas only and dual fuel throughout that county.

So I just thought it was an interesting stat.

One of the things we're trying to look at as we begin this is what are other, you know, industries looking at, not just utilities, but you know other industries in general.

So we can start to frame how this plan is is going to work.

So Next up here are the services that we currently provide.

We have PSE COM translation is available in seven languages, English being one of them, so six others. We now have the ability to store customers language preference in our CRM.

Our customer information system, if they choose to put it there, they they don't have

to.

It defaults to English and then they can go in and select.

A variety of other languages.

Our call center IVR has English and Spanish and the interpretation services that I referred to and I believe our third party has about 140 languages in their language bank.

And then on our energy advisor team, who also take customer calls, we have agents that represent Spanish Hindi.

And Cantonese that can translate right on, you know pse's call directly.

Our bill assistance programs, which we're probably all familiar with our our paper and online applications now are in English and Spanish.

And for online, we do have an effort happening this year to be able to add more online languages as needed.

And then for our customer outreach workshops, we have Spanish and Vietnamese speaking staff. And then and I've attended a few of these recently.

So we have community based organization folks that will come in for in person interpretation. And so at the last one we did which was down in Lacey at the library, there was we had quite a few. I think we had five different languages represented.

And then on our renewable front marketing for like Community solar and electric vehicles, we have English and Spanish available and then partnership with APCC for community solar opportunities and education in Vietnamese.

So part of the reason we're looking at this is to see for a baseline.

Here's what we have. And then as we build out this plan.

We can start to look at where can we expand on these things and what's missing.

You know, what do we need to add in?

So we've already done some of the legwork.

But we're, you know, near the beginning and I'll show you a timeline here in just a bit.

So this is the requirement from the rate case that a lot of folks have probably seen.

So we're going to develop a formal language access plan. I'll show you our timeline.

We have a self-imposed timeline, even though the Commission did not impose one for a bunch of reasons.

That we would like to meet.

And so we are showing you kind of where we're at here today.

Again, this is near the very beginning.

We'll be showing something very similar to this to the EAG next week as well.

And then start to gather feedback and input.

So here's our timeline.

So this is kind of where we were sort of finishing up kind of planning and scoping and we're working on a charter that's being reviewed.

And then we're just launching into this needs assessment and what that entails for us right now is it's an internal effort at the moment. We have identified a list quite an extensive list of key players in this creating this plan that are being interviewed and we're gathering all.

Of that input that will then be able to.

Combine into documentation that we can then share.

And add to from our advisory group groups feedback as well.

So we have, we'll be talking about this again at a couple other liac meetings.

Like I said, the EAG next Monday and our our imposed deadline is to have the plan published by the end of 2025.

That doesn't mean it's done at that point, by any stretch it is.

This is almost a starting point.

This is where then projects will be scoped to implement all of the things that the plan has outlined that we need to implement, if that makes sense.

So in scope for consideration, and again this is now the list.

Actually, just for fun, at some point I should share with you the whiteboard with all the sticky notes where we were trying to figure out.

What all could be involved?

It's very large, so this is our first round and what we've narrowed to we feel is worth being in scope with this first plan.

So more improvements to PSC com to the mobile.

App Call Center and IVR billing and payments, which includes not only paying the bill, but the notifications. The bill inserts, such as the voice that customers get that have a lot of good information on it.

All of our bill payment programs, not just for income qualified customers, but also everyone else for payment plans, installment plans, budget billing.

Customer communications during disconnections outreach.

That also is in the works.

To use the preference that I mentioned earlier, if a customer selects Spanish will be able to send those notices in Spanish.

That's kind of our starting point there.

That work is underway, but it'll also be in the plan and then storm response and particularly unplanned outages.

Communications we felt, was really important to get get some better.

Communications in different forms for that, our program enrollment processes. And again, this is not just income qualified but.

Enrollment for all of our other products and services that we're offering now to make sure that those things are easy to understand and and have the proper translation if needed and then small to medium sized business customer interactions.

We feel that sometimes our SMB customers don't get a lot of attention and you know a lot of those small kind of mom and pop shops, they may not have English as their first language.

And so when we're interacting with those folks, we want to make sure that everything.

Clear and understandable. And then everybody's favorite term right now.

Psp's for our public safety power, shut off communications.

So those are in kind of rural areas and this is new and we feel like because of the nature of it and the safety components of it that it should be in scope.

So I will pause for a second and see if there are any questions or comments.

Or anything any other PSE folks want to add.

Goodnight.

OK.

Well, we may finish this little section early, which is fine because we have lots to cover.

So my last slide is just components of the lap that we have done. Research looking at other other plans.

So these are kind of each section that would.

Be included in the plan.

So our introduction and purpose, the current assessment, which will include a lot of the interviews that I talked about, also include.

Information that we gather.

From you all, and then the services we currently provide and we've been asked by our equity director to kind of look at what are the best practices in those areas.

So it could be that for example our call center translation, that's the way it is is enough.

You know it's it's doing what it needs to do and it's meeting the need.

But maybe the IVR is not so. We just need to make sure that.

Whatever we're doing today is complete and meets the needs of our customers.

And then how are we going to make this, you know, put this out in the ether and make people aware.

What are the communications going to look like involving all of our, you know, lengthy list of PSE partners?

And then there will be some training and internal development, section evaluation plan and then where the rubber reach the road is the action plan and the road map and so.

We envision that several projects will come out of this plan.

That will then go into our process to write up a scope document.

Have some technical feasibility done, and then we'll have a road map for implementation.

So one thing we know is a lot of these things, especially if it requires a technology lift, won't all happen at the same time, but they will have a road map for when they can be addressed and then?

From there.

We'll have an internal owner of.

Of the plan, that is, you know, a living document. So as things come up, new things will be added to the plan and we'll kind of repeat the road map process.

What are we going to do in the next year?

No, it's not a one and done so.

If we have, say we have projects scheduled out through 2028, we get those all lined up and get dollars requested for those. And then we want to look at what's next.

There is also quite a list of things that for this first round aren't in SC.

That would probably come in later on.

So it's just we have a lot of touch points with customers as I'm sure you all know. And so they won't all be able to be covered on day one, but that is our goal.

So that is all I have for this.

Again, any questions anybody has?



Newman, Valerie 13:06

Theresa in the chat.

Charlie asked.

Is PSE doing the needs assessment itself?



Burch, Theresa 13:14

We are, yes.

We have a team that is doing well.

This is the internal needs assessment. Just to be clear, Charlie. So we are interviewing our internal key players ourselves.

We have a huge team of four of us that are going around doing all these interviews that will gather as far as any external needs assessments. That's where we need partnership.

For us to be able to get folks in the community.

That have you know, they see a need that we may not. And so that's another part of it that we'll have to hopefully work with you all as well as our EAG community partners and our CAP agencies and and what they're seeing. We're also really heavily looking at.

Our outreach team, because they're out there talking to customers, they have a lot of interest in this plan as you can imagine and and how we can make things better for their events.

Where PSE is on the ground.

Talking to customers.

So I hope that answers the the questions.



Charlee Thompson 14:20

Yeah, it it did. Thanks Teresa.



Burch, Theresa 14:22

OK. Anything else?

And thank you, Shay.

I see your comment there.

Yeah, it's a, it's a start, right?

We're we're getting there.

I'm sure it's going to be lengthy and like I said, we'll have a couple more meetings, one thing and PSE folks will roll their eyes because I'm kind of on my soapbox about this. But just keeping in mind, this is a plan and so.

Again, just that's that's a nuance here, right?

It's not projects that are being implemented as we go. It's a plan for what we're going to do in the long haul.

So, so thanks for listening.

I will give it back to Suzanne for what's next on the agenda, which is probably also me and maybe Valerie.



Sasville, Suzanne 15:08

It is.

Thank you, Teresa.

That was, it's really exciting to see this move in this direction for PSC.

I'm really excited to see that.

Language access plan unfold.

So yes, next on the agenda is Theresa and Valerie to discuss order four. And you know what it is and how it relates to schedule 111 and the definition of a low income customer. And then the ask of you. And so I will turn that over to.



Newman, Valerie 15:30

Yeah.



Sasville, Suzanne 15:46

Theresa, you gonna kick that off, Theresa?



Newman, Valerie 15:47

And well, me. I'm. I'm. I'm gonna give Teresa a little bit of a talking break and read the slides for this section.



Sasville, Suzanne 15:49

Oh.

OK.



Newman, Valerie 15:56

She'll probably be doing more answering questions about it than I will be, but I can at least give a little talking break for her.



Sasville, Suzanne 15:56

So.

Excellent.



Newman, Valerie 16:05

So this is about docket.

Ug 230470 order four, which was from April 18.

Of this year.

So this was the final order rejecting the joint petition and upholding pse's compliance with order one, and this is something where we're talking about it in this meeting, even though we know that there is.

A consideration being reviewed right now for whether or not to like.

Or send this and go back and reopen the docket.

But there's not enough time between when we'll hear about if we should be ignoring this order and when we need to report back about the order to get it done if it doesn't.



Burch, Theresa 16:52

Rape.



Newman, Valerie 17:03

If this order doesn't go away, and so we have to talk about it, even though it might end up being kind of moot.

And so that's why we're talking about it, even though we are very well aware of.

The kind of things that are going on with it.

So just that little disclaimer, but so as it is currently sitting in order four is the final order for this docket.

And then we took a screenshot of the Commission order.

About what we wanted to focus the discussion on today, which is the order around PSC must continue to work with its liac and interested parties to reach a consensus in further evaluating, refining and modifying.

If necessary, its tariffs schedule 111 definition of identified low income customer within 60 days of this order, and to make a presentation at an open meeting detailing the effectiveness of the outreach discussed in the joint outreach plan

submitted on September 13th, 2024.

And PSE might require identified low income customers to self attest or declare income eligibility under Schedule 111.

But she'll provide in verification as a prerequisite before being enrolled in Pse's BDR program to receive any benefits.

And then next, we brought in the text from Schedule 111.

Around the identified low income customer schedule, 111 is the greenhouse gas emissions CAP and invest.

Cap and invest adjustment.

So it's the one around our our cap and invest credits and charges.

And so sched schedule 111.

Says that and identified low income customer is a customer whose adjusted household income does not exceed the higher of 80% of area median household income or two 100% of the federal poverty level adjusted for household size, consistent with RCW 19405.

2025, who also one has successfully completed the enrollment process.

To take service under an applicable bill discount rate schedule or has taken service under an applicable bill discount rate schedule within the last 24 months as long as the customer has not been DE enrolled for failure to provide eligibility verification or two receiving bill assistance under SCHED.

129 low income program or has received bill assistance under Schedule 129 within the last 24 months.

And you're probably all very well aware, but schedule one.

29 is the PSE help?

Schedule.

And so.

We wanted to talk with you all around this question.

So does anyone feel like it's necessary to modify the definition of no low income customer in Schedule 111?

And that was the kind of point around Schedule 111 that the Commission was asking for us to talk with you all and get your feedback on.



Burch, Theresa 20:30

And I'll just add in the way we interpreted the order.

After a bunch discussion was that.

The Commission felt that we could continue to use self declaration.

Of income in order to receive energy assistance as the driver to then give a customer the prioritized CCA credit and for those who have read it, there is some discussion in there around decoupling those two things.

So I just wanted to provide some clarity here on that. They they really are already sort of decoupled.

They're two separate indicators, if you will.

You know one is.

Customer is on the bill discount.

Rate, that's their rate. The the fact that we've added this prioritized credit.

Is a separate.

It's actually a separate indicator in our customer information system, so it would technically be possible to add that indicator regardless of whether or not they're on the bill discount rate.

It's just the way that we designed it was to use that as the driver to do it.

Meaning that they meet the definition of of known low income for PSE.

And then they get that CCA flag for 24 months, and if they enroll again within 24 months, they get it for another 24 months.

So that's that's how we've designed it.

So I this is you know this order is really around Schedule 111 not not the bill discount rate which we were not planning to make any changes there, but the ASK in this order is do folks feel that we need to modify how we're doing it for?

The Climate Commitment Act.

Get shaylee.



Sasville, Suzanne 22:28

2.



Shaylee Stokes 22:32

Good morning.

Yeah, there's a lot to think about there.

I I just. I wanted to throw out that like in terms of just the the definition of low income that you have.

I think it's strong.

Don't the only thing that, as I'm reading it through, I realize we don't mention other

forms of energy assistance in there, especially like LIHEAP, which is 100% verified going in right.

So I think that's something maybe.

To consider.

But not something that would necessitate like a major tariff change.

Unless other changes were being made. But I think the definition is sound of identified low income.

And the energy project doesn't really see a need to change the definition.



Burch, Theresa 23:23

OK.



Shaylee Stokes 23:24

In terms of the the kind of connection to CCA.

Well that that's it.

And like how that how the whole process works out. I mean I think that PCs programs.

In supporting identified low income customers, they're scaling up.

They've been scaling up.

And like our, our asks for CCA protection. Flags was kind of a measure to.

Insulate a good number of gas customers while the.

The identified low income customer programs are are scaling up so that a significant number of customers are still protected from the CCA who?

Are highly likely to be low income.

So and I think you guys under you guys kind of understand that that's there, is that difference between people who've been?

Who are actively saying yes, I want to enroll in a program and this is my income versus the other like third party data that identifies them as highly likely.

To be low income like we understand that there's a difference there.

However, the data seems really.

High integrity and in the interest of holding customers harmless from CCA costs, it felt reasonable, but I think the definitions themselves are are strong, so that that's kind of where we're at with this.

We're willing to see what, whether the Commission is going to reconsider.

Any of its thoughts on on this subject?

And.

Maybe go from there.



Burch, Theresa 25:10

No, that's great.

That's great feedback and Valerie, could you go back to the Schedule 111 slide really quick because this that is one thing.

We do have schedule 129 included, which is, you know, PSE help well and past due bill forgiveness technically.

We could take a look and see, you know, 'cause, if we have customers that did get LIHEAP and not part of pse's other programs.

I agree that you know they could.

They could be included here.

That's something that we didn't do.

Because I think we felt like that would be a small number, but the data is something we could look at so.

Yeah, Suzanne.



Sasville, Suzanne 26:00

So I believe that a LIHEAP customer which caps at 150% of FPL is included in the definition of the higher of 80% or 200% it it encompasses that level.



Burch, Theresa 26:18

It does. Yeah, it does.

It's just that for this flag, we're not looking at LIHEAP, we're only looking at BDR and PSE help.

I think that was Shay's point.

I hope is what you meant, Shay. Is that so? We could.



Sasville, Suzanne 26:29

I see.

So if a customer didn't get help that did get LIHEAP. OK, got it.



Shaylee Stokes 26:30

Yeah.



Burch, Theresa 26:32

Right.

Correct. Yeah.



Shaylee Stokes 26:36

Yeah. Or maybe they got Liheap last season and their benefits have circled out or something like they they would still be.



Burch, Theresa 26:38

Or right exactly.



Shaylee Stokes 26:43

It would be great if they were still protected.



Burch, Theresa 26:46

Well, and because those things don't as as we all knew, right, BDR help and LIHEAP are not aligned anymore.

They happen throughout time and space, and so because the flag gets updated to an additional 24 months, I think that's something we could look at.

I obviously would have to talk to our our tech people about what it would take, but that's something we can take note of as a part of this discussion.

We we did meet with legal and PSE has.

Determine that we don't need a compliance filing for this discussion, but we do need to schedule the presentation that was asked for, which I know we had shared with you all already. Our data that we've now compiled on the results of the various outreach.

So that'll be coming up later this summer.

I'm not sure if anyone else is on the call that knows what date that might be.

Maybe Kalima if she's out there, but I'm not sure if it's scheduled yet.



Yakupova, Kelima 27:45

No, not yet. Yep.



Burch, Theresa 27:47

OK.

Thanks.

So anyone else have any other comments on it?

I mean the other option is that we could.

At this point, because part of what the order says is for us to determine if it's necessary to make a change.

Could say that at the moment we don't feel it's necessary to make a change and then see what happens with the order and the petition.

That's outstanding, which could end up with us receiving a subsequent order that we would then have to address.

But I'm curious if anyone else has any comments on it.

OK.

I think that is loosely what we needed to do, again with this pending, as Valerie said at the beginning, it felt a little odd to have the discussion now knowing that something else could happen, but because it said 60 days, which is June 18th, we felt like we.

Better at least bring it to the group.

So thank you for indulging us with that. And if you think of anything after the meeting, send it our way please.



Sasville, Suzanne 29:09

Thank you, Valerie and Theresa.

Next on our agenda is Nicole Eagle to talk about.

Our disconnections and.

I will have her take it from here.

And Nicole, do you need anybody to share their slides or are you going to be sharing yours?



Eagle, Nicole 29:33

No, I will share, Suzanne.

Give me just one second and let me know when you guys can see it.

Hopefully it's up.



Sasville, Suzanne 29:48

Yeah, we we can see it.



Newman, Valerie 29:49

Yes.



Eagle, Nicole 29:52

Fantastic.

I get uh.

Oh, what did I just do?

Hang on, let me share that again.

Can you stop seeing it correct?



Newman, Valerie 30:15

Yes.



Sasville, Suzanne 30:16

We're not.



Eagle, Nicole 30:16

OK.

Give me one second.



Sasville, Suzanne 30:17

Yeah, why not. OK.



Eagle, Nicole 30:17

Let me share that again.

OK. Do you see it?



Sasville, Suzanne 30:26

Yes, we do.



Eagle, Nicole 30:28

OK.

Fantastic. Well, good morning everyone.

I know several of you.

I may not know all of you, so I am Nicole Eagle.

I'm our manager of credit collections.

I also manage our field guys and gals that go out for field collection visits and then I also manage a small back office team that handles different processes like bankruptcy.

These customer balanced refunds etc.

So thanks for having me today.

I am going to just apologize in advance.

I am still getting over the very, very, very awful spring cold that is going around right now.

And what is left is a very nasty cough.

So I may mute myself here and there, but I will do my best not to cough in your ear.

And if I do, I apologize.

So I'm here today to talk about our disconnection.

Practices. I'll kick it off with just our compliance requirement and kind of why we're here today, which is to review our disconnection practices and consultation with both the LIAC and the EAG.

And then later we will be documenting our collaboration on this topic with the Commission.

So I'll start off with really the the meat of the presentation.

Yes, I have a few other slides that we'll cover today, but I think we'll spend the majority of our time here.

Which is our I start with our targeted outreach process on past due balances.

So this is also known as our Dunning process. I think most of you guys are are familiar with hearing us say the term Dunning, but our process starts by looking at a set of parameters.

And those parameters include looking at the past due balance limit, whatever that may be set up at the time. It also looks at the customer propensity to pay segment.

We do use a third party propensity model which helps us segment customers based on their account behaviors and then.

We look at customer type.

So are they residential or a commercial customer?

We then look at days and arrears.

So one day past the invoice due date and the customer meeting the parameters that I just covered are targeted outreach process begins.

So we start with looking at between 1:00 to 5:00 business days and arrears, we start off with proactive outreach to the customer. If the customer does continue down the process.

At six business days in arrears, we send our first notice.

Which is called our urgent notice and we are also making some additional proactive outreach at that same time.

And really, our calls and our notices are aimed at doing a couple of things, one, helping the customer learn about programs that we have available to them and also the notices and our calls also provide ways to avoid a disconnection.

Today our notices are being sent hard mail.

And they also go out via e-mail if we have a good one on record.

If the customer does continue forward in the process at 13 business days and arrears, we do send a final notice and we also at that time are making our final outreach call.

And if their account continues to progress, the next step is at 19 business days.

It does reach my field team and we are then doing a field collection visit.

And then we have several days there where either a visit is made and or a disconnection may happen.

So as Theresa already mentioned, but I'm going to repeat it because I think it's a really great opportunity for us in this Dunning process.

But we are in the works of translating our notices.

So currently today they are only sent in English, but soon we will have the option to also send them in Spanish if that is the preferred language selected.

By the customer. Our goal is to have that in place by end of this month. In the event that it slips a little bit, we're hoping for then July.

So as you can see, the Denning process includes a lot of outreach with our customers and our main goal in this process is to connect with as many customers as we can as early on in the process as we can to make them aware of the programs and.

Protections available.

I've listed several down at the.

Bottom of this slide.

Which are really just a ton of really great programs and protections that we have available to them.

I won't read every single one, but you're very familiar with.

Obviously we have PSE help, LIHEAP. Our bill discount rate.

We now have our past due bill forgiveness program.

All great things for income qualified customers.

Same with our warm home fund.

Of course, we have long term payment arrangements.

Choose your own due date.

Budget payment plan like Theresa mentioned earlier, which is listed here as level payment plan and then several protections as well and so.

Really. You know, our goal is to make sure that the customer is aware of all of these and that they do need to act on their account, decide which one of these programs or protections works the best for them.

So that we can stop them from progressing in this process, if we can, and then also if we can also prevent the disconnection.

So we know that there are a lot of different types of customers going through this process and we recognize that individuals.

It's definitely have different circumstances and needs, but we do believe that that several of these programs and they can engage with multiple at the same time. But as long as they participate in them, we can get them back on track.

So I'm gonna pause there.

I think we may have some questions on this slide, so I'll pause there and see if there's any questions that I can answer before moving forward.

And I with me sharing. I can't see if there's any hands up or if anybody's put anything in the chat.



Sasville, Suzanne 37:06

We've got you covered and I'm not seeing anything at the moment.



Eagle, Nicole 37:13

OK.

So I will move on to our next slide, which is just showing a little bit of you know, all of that said, our Dunning process is really great.

It does.

A lot of outreach to our customers in hopes that we can get them back on track, but all of that said, yes, disconnections do happen. And while our disconnections are extremely regulated, we have a lot of policies that we must follow.

And they guide us in, you know, who we're disconnecting, how we're disconnecting when we're disconnecting, or if we are disconnecting at all.

But I provided a graph here that that does show the number of customers that have reached a field collection visit over the last several years, and then of that the total and the percentage by year that we've actually disconnected.

And as you can see, it is a small percentage overall on an annual basis and while having zero customer disconnections would be ideal, it's not quite realistic. And so just kind of showing a little bit about where where we've landed. So 2022 we had re ENT.

The field mid-May of that year, which was coming off of the disconnect moratorium. We also were also doing our disconnect reporting.

With the Commission, which gave us the OK or the not OK to proceed with putting a customer in the Denning process to then potentially disconnect?

And that year, we had about 40,000 customers reach this connection.

We disconnected that year about 1500 customers, a little over, which was an average of about four percent 2023. We had about 63,000 customers, almost 64,000 reached the queue.

We disconnected about 7200, so on average about 11% that year. 2024, we did start to creep up.

We had about 84,000 customers reach the queue again on average about 11% disconnected. And then in 2025, this is year to date, we have had 87,000 customers reach the queue and we're currently at about 6% on average.

Being disconnected for the year, we thought that it would be good to also show over to the left just the amount of assistance that we have provided to our customers kind of over the same time period. This is just showing PSE help.

Which we know did help some of the customers in the Dunning process. It may have also prevented some of them from reaching disconnection step. But even with all of the assistance available.

Well, it still was not necessarily enough to stop all disconnects.

And again, this is not showing all the other assistants funding that we also had available during that time frame, which was even more millions distributed and thousands more customers assisted during that time.

Again, this is just PSE help, but it is really nice to see the trend year over year of the not only dollars distributed, but also the number of customers going up.

And I figured I'd call out at least our current program year.

So right now we've served about 42, almost \$43,000,000 to almost 60, a little over 65,000 customers and we're forecasting to distribute about 106.

\$1,000,000 this year.

So definitely good to see you over here that we are increasing the number of customers not only participating but also receiving the assistance.

And then just as a reminder, I know we've talked about this in the past, but I figured I would just plug it in here as just a reminder, we over the same time period have been working through our phased Dunning program.

I won't read them all.

I will just say that we have concluded our Phase Dunning program.

So we converted over to our phase five, which did reduce our Dunning threshold limit to \$250 or more past due for all of our customers. And we made that change last month.

Any questions on this?

OK.

Well, I will head into the next slide for you guys today, which is I just wanted to share that we had recently surveyed our customers who had recently gone through the targeted outreach process.

They were also disconnected and reconnected and we really did this survey because we wanted to hear from our customers voice.

How their experience was and if there was anything PSE could do.

To improve our process and so the table represents the questions that we asked during the survey along with the results. And while I will share that the survey was not the highest rate of participation, it was still within the lower end of of kind of our expected partic.

But we do plan to do more of these in the future.

But I will say overall the the survey was pretty pretty positive.

There are some results here.

That we certainly can dig into further to see what improvements maybe that we're able to make.

But but again, the survey was a really good starting point for us to understand how customers feel about this process.

Specifically, up to and after being disconnected.

So again, I I won't go over all of this. I know we'll we'll share this presentation with with you all, but I'll hang tight here.

As you guys are are reading it to see if you have any questions on this.

And I do look forward to doing more of these surveys.
I think the more that we can hear directly from our customer is great.

 **Shaylee Stokes** 43:45

Hey, Nicole, this is Shay.
Hey, question.

So yes, the survey it, it is, I think a good idea to survey on disconnections, although I think this is one topic that I don't know if PSE doing. The survey themselves is.

Would guarantee unbiased results like PC sort of a power and authority.

In a role of power and authority.

In this instance, especially to a group of people that have been disconnected in the, you know, recent past and I like, well, I definitely think that half the people saying, yeah, I found it easy to get reconnected. That's, you know, that's interesting then.

And like there's some int.

Things here that can certainly still guide actions. I would personally like to see something.

If it was a survey on this subject coming from a like a third party.

 **Eagle, Nicole** 44:46

OK.

Yeah, thanks for that feedback.


I appreciate it.

I don't particularly know if we use third parties to do surveys. If if Theresa or Carol know that. But I do think that's something that we can we can take back and and consider for sure.

So I appreciate the feedback.

 **Burch, Theresa** 45:09

Yeah, sorry, I couldn't. Couldn't get off mute. I don't.

 **Eagle, Nicole** 45:09

Pat.

 **Burch, Theresa** 45:12

I do think we can.

We need to reach out to customer insights and ask them.



Eagle, Nicole 45:17

OK.



Burch, Theresa 45:18

I think it's a service you can pay to have a third party do for you. Kind of like great place to work and stuff like that, right, Carol?



Eagle, Nicole 45:22

I see.

OK, good. Good to know.

Thanks for that.



Wallace, Carol 45:27

I'll have to get off.

Me too. Yeah.

Definitely something we can consider doing.



Eagle, Nicole 45:34

Fantastic. Any other questions on the survey?

OK.

Well, I will round it up. Oh.



Sasville, Suzanne 45:44

Andrew.

We, Andrew Roberts? Yes.



RA Roberts, Andrew (UTC) 45:48

And I guess one concern with doing a third party, I think a third party is a good idea, but I think that you you're gonna have to by default that that third party's going to know that the customers had difficult difficulty paying.

In in the last few months.

So.

I.

I guess it's just, you know, sharing customer data with.
With the surveyor.



Wallace, Carol 46:19

Against our privacy policies too.
You're right, Andrew.
We'd have to check with our legal team.



Eagle, Nicole 46:32

Call out. I've got that noted.
Thanks Andrew.
OK.
Well, I will head in.
We're we're wrapping into the last few slides here, but I I just wanted to to pose some thoughts to the group and and maybe have some dialogue.
But when it comes to disconnecting a customer, as I mentioned earlier, disconnections are very highly regulated. Lots of policies and procedures that you know PSE must follow before.
Even considering a customer disconnection.
But I just wanted to open it up to the Members here if there was any feedback that PSE should consider regarding our disconnection practices, I just put some ideas here on the slide that could maybe get us talking about this process, but certainly open to everything and any.
But just some of the ideas I listed were is there any different outreach engagement that we could consider during the donning process?
Or if there was anything that you can think of.
That we may need to consider to try to reach more customers specifically, maybe in some of the harder to reach areas.
So I will open it up to the floor.



Shaylee Stokes 48:03

Yeah, hi, I can start.
I like I sent an e-mail earlier this morning on this subject, which I I don't know if everyone's been able to see but.

I want to dig into a couple like specific things about disconnections that I would really love us to explore.

You touched on the earlier slide on the propensity to pay like factors that funnel people into donning in the 1st place, right?

And one of the major ones is how much they owe. Another major one is the. Kind of behavioral score that they have based on their history with of payment and other other factors, right?

I would love for us to dig into that.

'Cause, I think that there are some flags there about.

How people who have a history of energy and security.

Are kind of expedited into the Dunning process because they've been flagged as someone who is probably gonna have a hard time paying.

And being flagged as someone who's probably gonna have a hard time paying, I don't think is problematic in and of itself, especially because it it can prompt outreach. And as you mentioned, outreach is one of the results that you're looking for in, in credit collections.

However.

I mean, it's still it's still a process that has a beginning point and the end point is disconnection and it feels like we the company is really wanting to funnel everybody into this one path that has the beginning point and the end point and.

I like my my underlying.

Like question here is that that I want to challenge is that I don't know that we would have to do it that way.

I think we could do it a different way.

Where we're still doing targeted outreach to people with history of energy and security without expediting them being shut off.

The other thing that I would really like to dig into is what are who's being shut off right of the of the 11% of people who go into Dunning who got shut off last year.

Or, since 2022, how many of them shut off multiple times?

How many of them are identified low income customers?

Are there zip codes that are being hit more right, like those sorts of characteristics of who's actually reached the shut off point?

I think those that's also where we could look and see.

Are are there ways to improve or at least reduce the possibility of of severe consequences and harm? Right.

It's it's to me. It's about it like.

The energy project kind of asking for this discussion and this exploration really is in the context of of equity and and reducing harms. And so like the like, I'm not saying the PSE isn't doing lots of good things and I hope I encapsulated that in my e-mail because.

I really do believe that.

Like it's it's not that you guys don't care about your customers and not trying.

To keep them out of disconnection.

But there's this one big path, and it feels like there's a lot of rigidity in exploring other ways that this could.

Be done.

Disconnections are they're problematic.

They have really problematic consequences for vulnerable communities, so I think it's worth spending more time digging into some of the other pieces here.

Thank you.



Sasville, Suzanne 51:47

Thanks, Shay.

Carol.



Wallace, Carol 51:52

Hey I did.

I did actually have an opportunity to read what you sent and if I think I think it has.

You have a lot of good points that you're that you're covering.

I just wanted to share that.

We hear a lot about the harm that that our customers with suffer because they're disconnected, but in reality it's a momentary disconnection.

It's not like we shut them off and they don't get turned back on again.

It's a very short duration of time. All they have to do is call us in most instances.

So I think that we have to weigh that against the growing arrogance that we still carry.

Nicole, could you go to that one slide real quick?

I just wanted to point out kind of where we are financially because of the disconnect moratorium.

If you look currently we're carrying arrearages to help almost \$162,000,000 and it's

been that way for three years.

And despite the hundreds of millions of, you know, \$100 million in assistance that we've we've provided for our customers, this is I think it's like 67% increase of pre pandemic levels of arrearages. And the thing that's really concerning.

Is those over 90 day buckets of arrearages the way that our system works?

If the customer pays a bill, it takes it takes a payment of the oldest collectible, so the oldest arrearages are going to get paid off 1st.

What this is telling us is people in those higher number of days buckets aren't paying us and so we have to weigh.

This continued arrearage strain on our company's finances.

With also trying to be fair to our customers.

So I think I think we have to look at it holistically and the fact that you know we we are also experiencing harm because of this and we do make as you mentioned in your e-mail and and you just said which I really appreciate. We do try a.

Lot to do outreach for our customers.

Give them information on what they can do to avert disconnection.

We have a lot of programs that we're.

Administering and and we definitely want to partner with ways that we can help through this process. But I I just wanted to point out that we have considerations as well.

Thank you.

 **Shaylee Stokes** 54:17

Yeah.

And part of why I want to look at the characteristics of people who are getting to the point of shut off the people who are not able to get themselves out of Dunning like it being shut off at that point didn't do them any good, did it do?

You any good? Like that's that's sort of what I want to explore. I think that there's.

Other yeah, I would like to kind of look at that more deeply.

I don't.

I don't know that shutting them off at all is is really accomplishing anything for any of us.

In those cases where people are super behind.

 **Wallace, Carol** 54:52

Well.

Yeah. The thing that it does douche, and and this isn't good for PSE by the way. It erases their debt that accounts closed and they open a new account with no debt so so that is in itself a small amount of relief. Now some people pay that debt and some people don't. And so, but we don't send customers to collection and. It's it's not the best solution, but it does get them out of that ever rising amount. Of a rare that's on their account.



Eagle, Nicole 55:31

Yeah. And Carol, I I just want to say we, we do send customers to collections.



Shaylee Stokes 55:31

Yeah.



Eagle, Nicole 55:35

I think you meant we don't credit report.



Wallace, Carol 55:39

Right.



Eagle, Nicole 55:40

But Shay, I I think you've opened something that I think we can consider.

Which ultimately is, yes, we have.

We have one main Dunning path that we operate customers based on. If they are displaying a propensity with their account behaviors.

Of somebody that is not paying, and while I would argue that having them enter the Dunning process.

Is a good thing for them because of the outreach that we're doing.

But recognizing that, yes, at the end of of our Dunning process is disconnection. So is there a way to and and we've had these internal discussions?

I've talked to Teresa's ear and Carol's ear off to death.

There are things that we are considering internally as far as do we set up different Dunning procedures for different segments of customers?

So it is something that we are analyzing internally, but I would say the one thing that

I do just want to mention is we do have customers that do not wish to engage with programs that we offer.

For whatever reason.

It's it's a valid reason to them.

And so for those situations, a disconnection may occur.

And while it's a disconnection, I believe very strongly that we also need to keep reminding ourselves that the customer has the right to choose what is best for themselves at the time.

And we have a lot of choice within our Dunning process.

You can choose to take action.

Engage with our programs.

And protections all of the things.

We can continue to encourage them to engage with us, but at the end of the day, I do have to believe that they may also be making the right choice for themselves.

I know Suzanne has forward me several within the last several months from just coming from directly from the CAP agencies on just some really egregious, very high balances that have grown over the last several years.

Years for customers as we are all aware and and through the the past due balances that Carol just covered. But even with getting them the assistance getting them on the bill discount rate to help with you know hopefully discounting you know ongoing usage to help them enrolling them.

In our past due bill forgiveness for the top amount of 2500, I think the last one Suzanne sent me, the customer still had about 6000.

Outstanding. And they came to the conclusion that disconnection is is probably best for them.

Start over.

Get a new account.

Let's get you reconnected.

You now know about all of the things that we can offer you.

Let's hope that we can keep your your new account on a better path.

But again, just just wanted to mention we still have a lot of those customers kind of flowing through this process.

So.



Sasville, Suzanne 59:05

Andrew has his hand up Andrew.



Roberts, Andrew (UTC) 59:10

Yeah. Thanks.

So you know it's it's been going on for for quite a while, but this the this topic of alternatives to disconnection is something that we have a rulemaking open for right now.

And we we went out and and asked.

The the parties several times.

You know what alternatives are available?

And.

Kind of, you know.

I think what we got back was kind of two camps.

One is to just stop doing it and the the other is is more communications.

If there's, you know something.

In between those, I would love to hear about it.

Because we're we're not finished with the rulemaking.

In fact, we're we're probably going to be sending out the the rules later this this summer for for review.

So it's I I think it's something that we can address not not just with energy, but with all of the regulated.

Energy companies in the state.



Sasville, Suzanne 1:00:36

Thank you, Andrew.

I'd like to just submit that in. In my experience in both customer care and in managing the energy assistance programs.

What I've noticed is.

The the response from customers that need a hold put on their account while they seek assistance or while they come up with the money that they need.

Is best done.

Early on, you know when the bill is smaller and.

As a means of bringing attention to their response, and so and hearing from our CAP

agencies too, the urgent notice that gives them the 13 days is something that when done early on, has the customer either calling us.

For communicating with us to let us know when they can pay and when we didn't have those, the bills tended to just accumulate.

And then now as we've gone through the five phases, we've seen ones that accumulated to be so high that even energy assistance can't assist.

So I am.

I am an advocate for.

The urgent and final notice being a means to bring attention to it for the customer to respond to us.

And. But yeah, thinking of other ways. If there's other ways is what we definitely want to hear too, Charlie.



Charlee Thompson 1:02:21

Thanks Suzanne.

I just wanted to chime in with, I don't know, a couple different thoughts before we we moved on.

Not just, not necessarily.

A direct response to what you were saying, Suzanne, so I hope that's OK.

So one is an anecdote that I, you know we we share a lot of anecdotes in this space about disconnections.

But I heard it last week, so it's very much on my mind and I was like, oh, I I don't know.

I thought it might be helpful to share to this group while we're still talking about disconnections, and I was chatting with.

A former peer of mine who grew up in a low income family, which I didn't realized.

And she she told me about how being disconnected, particularly like when she was a child, was very traumatizing for her as a kid and also for her, her mom, who was a single parent at the time because her, you know, her mom felt like she was letting her.

Down.

So even though it sounds like a lot of disconnections last for.

An hour or a few hours or relatively short period of time compared to maybe some outages or something like that. It sounded to me like I I had this kind of more tangible realization that, oh, like these these types of things, even though they're

short or can be.

Short can have longer term negative impacts on in her case, like family relationships, mental well-being and things like that.

So that came to mind and just wanted to share that.

Another thought.

I like that Shea's ideas earlier of looking into, I think, Shea said.

Who is being disconnected?

And I didn't catch everything that Shay said.

But you know which zip codes are? Are those folks falling into? How many are low income things like that?

I thought that that was great.

What else did I have?

Oh, and then so.

I also echo what Shea said about. It's so many.

It's great how many options there are.

Preferable assistance and how much work this group and PSE has done in the last couple years to make Bill assistance more accessible to folks and have have has been, I think open to you know, redesigning and kind of looking back and tweaking and think that's been a a.

Pretty good process overall.

And now, seeing like the language access plan and having the multilingual bill assistance options and call Center and Preferences also very much excited about that and love to give credit where credit's.

Do so this idea that I'm about to to say kind of came up when we had the joint liac EAG meeting last month. So a few weeks ago.

And that's that.

A lot of the existing options that we have for customers right now to try to avoid the Dunning process are things great, things like I said, but things that put a lot of the work on the customer. And I think it's fine to have options like that and.

It's great to have options like that because as we had said, it's.

You know, customers go through these things in different ways and some have capability to to be able to look into different bill assistance and you know different options that work best for them.

And at the same time, and this is the thing that kind of came up at the liac EAG meeting was my curiosity. If there are more things that we can consider that put

more of the work on us, like in the back end.

Of the the utility system by you know.

I guess the energy Project's idea is it is one example like considering is the current funding process, prioritization.

Something that we want to look into in more depth and it sounds like there has been, you know, expressed desire to do that.

And last thing that I wanted to say is that I really appreciate the the joint liac EAG meetings.

Last month's meeting we didn't get to dive super deep into this topic, but.

I always feel like when we do those joint liac EAG meetings, I get a lot out of hearing what the EAG has to say.

And it's it's nice overall to just kind of connect the advisor groups when, when when possible too. So that was a lot of different thoughts, but wanted to get them, get them out before we moved on.

So thanks for for listening.



Eagle, Nicole 1:06:49

Great. Thank you, Charlie. Appreciate that.



Sasville, Suzanne 1:06:55

Andrew.

Daniela.



Daniela Romo 1:07:13

Hi everyone.

I also do.

Agree on just knowing more about who is getting disconnected, I think.

Like zip codes, you know specific communities if specific language barrier as well are being affected more.

Certain incomes, I think that will also.

Give us better idea as well as.

To the outreach that needs to happen to kinda improve on that.

I think also.

Strengthening the relationship between the utility and the customer to build kind of like that trust 'cause maybe there it is that right?

If the only relationship or the only.

That, you know, they're just receiving kind of like the the Dunning notices, you know, it's a scary thing. And so.

For somebody who's in a vulnerable situation that's only receiving, you know, those donning notices and those disconnection notices from the utility company, that's already a scary.

Situation for them, you know? And so the idea of them going to the utility for assistance.

Sometimes it it's just that relationship right is just strengthening that.

And I think if there's like a specific population or specific zip code that's being affected, more if there's outreach around that to strengthen the relationship between the utility and the customers there.

Would be helpful as well to see, but I think knowing more you know about who specifically is.

You know, being put in the Dunning notice.

In a.

In a broader context, would be good too to know.



Eagle, Nicole 1:09:27

Thanks Danielle.

I appreciate that as far as the data that.

Shaylee, Charlie and you had mentioned I should be able to provide that relatively easy.

As in, as this presentation goes out, I can supply it to Suzanne, Valerie and Theresa.

I do believe that still required reporting that we are sending either monthly or quarterly.

Somebody can can confirm, but I believe that it is reporting that it's still going over to the Commission.

So we should have that readily available and should be able to supply.



Roberts, Andrew (UTC) 1:10:05

That's that's kind of why I have my hand up.



Eagle, Nicole 1:10:07

Oh.

RA Roberts, Andrew (UTC) 1:10:07

I don't know that we're.

I don't know that we're getting disconnections by ZIP code.

But we do have arrears by ZIP code going back to probably 2021.

And that's been reported in docket 200281.

It's not confidential or anything, so you know everybody here can access that on our external website.

And that's it's not just PSE has been reporting.

That's it's all the investor owned utilities.

DR Daniela Romo 1:10:43

One other thing.

Is looking at owners versus renters as well would be good. I know that.

We have some clients, you know that if they go into a disconnection or to get, they get disconnected. They're also at risk for eviction if they just get put in that and so.

I think looking at that as well and maybe partnering with the whether that's like apartment complexes, you know, so clients are kind of like more aware.

To receive assistance and just again like just build that relationship with within the apartment complexes. If there's. If we see there's a like a higher number there for renters.

In specific populations.

SS Shaylee Stokes 1:12:04

And just to throw out one last thing, because it's very top of my mind to is and I I know several of you have heard me say this already, but I think that the medical need for service.

Process is is something that we could look at to first of all make it a little bit less burdensome and also like what do you do for people who have a medical need for service, who get a high arrear right? Like do they do they go to?

Collections. Do they have some sort of like communication with the with the company about their balance? And then is their account like closed and reopened without shut off?

I mean like what happens for those folks? And are there protections in that realm that we could mimic or look at like any way that like that whole sector of of people

who like have a, a real health?

Reason to be to be kept on or or people who have households where the person who's responsible for the bill.

Is not necessarily the one that's gonna be adversely impacted by a shut off.

It's going to be the other people in the household who are especially vulnerable or frail, right?

So those sorts of things that that's why I mean Andrew, to your point earlier, you kind of mentioned that like what you've heard is that disconnections either shouldn't happen or we should be better communicating with with people. And I mean yeah, when you boil it down because there.

A lot of problematic consequences.

And you ultimately don't know who's going to suffer them necessarily by shutting off.

That's, that's where. That's where that that comes from.

However.

In the interest of like, how do we reduce harm?

How do we?

How do we all work together to find common ground to to kind of move this issue forward?

I think there are plenty of things in the middle that we could be working towards.

So yeah, that's sort of I've been thinking about what you said.

RA

Roberts, Andrew (UTC) 1:14:08

Yeah. So we we have a a rule for medical situations that provides additional protections to the customer.

That's that's something that in the rulemaking we're revising and and probably well we're we're revising it.

I know in interest of mine is to make that process less burdensome for the customer as it's currently written, the customer gets protection for, I believe it's 60 days.

Days and then they need a note from a medical professional, and if they have to keep going back to their medical professional to to keep doing that process over and over again, I think that's that's very burdensome and probably expensive so.

Kind of revising that so it's it's less burdensome.

There's definitely an interest to me.



Eagle, Nicole 1:15:19

OK.

Well, this has been a really, really great discussion before I head on and shift gears just a little bit.

I just wanted to open it up if there was any other additional comments.

Or feedback.

Because my voice is going downhill.

I am sorry I have not been muting myself very well and I'm having a hard time not cough right now.



Wallace, Carol 1:15:45

Hey, Nicole, I was just going to say I think that Andrew's correct that we don't have zip code data on what we're reporting to the Commission, but we could certainly have our customer insights team pull that data for us, but it wouldn't be like today.



Eagle, Nicole 1:16:02

Oh yeah.

Yes, absolutely.



Wallace, Carol 1:16:06

OK, cool.



Sasville, Suzanne 1:16:12

And Nicole, are you?

Are you OK during the rest of the slides?

Would you like me to do them?



Eagle, Nicole 1:16:17

I just have one, I think. I think we can make it through, but I'm so sorry I have not been muting myself very, very well.



Sasville, Suzanne 1:16:18

OK.

OK.



Eagle, Nicole 1:16:24

So let's just move forward.

Can you guys you can still see my screen right?



Sasville, Suzanne 1:16:29

We can.



Newman, Valerie 1:16:29

Yes.



Eagle, Nicole 1:16:30

Fantastic. OK. So shifting gears just a little bit, which is talking about our PSE field visits.

So our field collection visit.

We would like to change.

Ever so slightly.

Which in case you are not familiar with.

Really, since rolling out back into the field.

We decided as a company that it would be best to visit all customers.

During that visit, we were also leaving them a what we call a 24 hour notice.

In the field, which was really a way for us to, you know, get ourselves back into the field, get customers familiarized with us resuming.

Our our process in the field now that we're kind of back, we're heading out of coming out of phase five. What we'd like to do is to resume back to what we did for our our field visits, which is going back to just one field visit.

And I say where applicable, which is for us, would be to go out and to work with the customer on payment options, right?

Obviously we are going out there in an attempt to collect on the past due balance, but if the customer is having some challenges, work with them on on repayment options.

My field staff also does a very good job of articulating the programs that we have available.

But also going back to one visit where that may also subsequently end in disconnection. And then while we've been doing remote disconnections for quite

some time, we are looking to do remote disconnections without a visit where applicable.

The biggest change here that I want to call out is there is zero changes.

For known low income customers or what we just talked about?

Our medical condition customers or medical emergency where they've had that in the last 24 months and that is currently outlined in our AMI rulemaking or by the SITA definition for low income. So there are zero changes there.

A field visit will still be made for those customers. It would not be a remote disconnect without a visit.

And that is a rule that we we must follow.

So we are looking to kind of resume back to normal operations soon.

As in, as soon as phase five kinda works its way through the process, we do still have the accounts going through the done in process as we as we speak we are expecting to see.

The customers reach the disconnection queue towards the tail end of this week and then we have our regulated rule of about 10 business days in the disconnection queue for us to make our visits and or potentially.

Disconnect the customer and then we would be looking to resume back to kind of more normal field operations sometime in July.

So that was it.

That was all that I had for you guys today.

I can open it back up for any questions.

All right, not seeing any hands up.

I'm not sure if anything's in the chat, but Suzanne probably would have mentioned it.

So that's all I have for you guys today.



Sasville, Suzanne 1:20:42

Yeah, we have.

From Shea, it was a little while back at 11:07 and then 11:18 and she was contributing strategies for people with really high arrears is an issue. I know many agencies want to explore.

And then, she said, can we also look at data on customers with multiple disconnections?



Eagle, Nicole 1:21:08

Yes, we can.



Sasville, Suzanne 1:21:09

And.

Then.

Marie agreed.

Marie Stanley.

Agreed with that and that is.

And then Shaylee asks, when does phase five start?

And that started May 25th, Shea.



Eagle, Nicole 1:21:29

May 19th.



Sasville, Suzanne 1:21:30

Oh, May 19th, OK.

All right.

I'm not hearing anything else.

Really good contribution today. Thank you everyone.

We have our next meeting July 8th and it will also be a pretty full meeting and 10:00 is the start time for that. So we'll be sure and send the agenda and associated documents out to you in advance of the meeting.

Is there anything else that anyone would like to put on that agenda for next month before we leave today?



Shaylee Stokes 1:22:37

Do do you think we'd have disconnection data discussion by then or would you need more time?

Or would that be a separate meeting?



Wallace, Carol 1:22:47

Oh, do you mean the data that you want to see, Shay?



Sasville, Suzanne 1:22:48

Mm hmm.



Shaylee Stokes 1:22:50

Yeah, I've just sort of like next iteration of of kind of looking at at the follow-ups from today.



Wallace, Carol 1:22:58

We we would definitely be able to have the data by then, Suzanne, I don't know what it's all on the agenda.



Sasville, Suzanne 1:23:04

Yeah, I'll look to see what our time schedule is for the full two hours and see what what time is free on that.

I don't have it at the moment because I'm still trying to find my my end drive after this change to the new computer.

So we'll we'll get back to you on that, Shay.



Wallace, Carol 1:23:25

What we.

Yeah. Thanks, Suzanne.



Sasville, Suzanne 1:23:37

Well, we will adjourn then now and again, thank you for all of your contributions and I wish you a good rest of your day.

Thanks so much.



Charlee Thompson 1:23:52

Thank you.



Shaylee Stokes 1:23:53

Thanks. You have a good day.



Wallace, Carol 1:23:53

Thanks everybody.



DeBell, Michelle (COM) 1:23:53

Thank you.



Burch, Theresa 1:23:53

Hi everybody. Thank you.



Yakupova, Kelima 1:23:54

Thank you.



DeBell, Michelle (COM) 1:23:54

Take care. Thanks much.

□ **Sasville, Suzanne** stopped transcription