BEFORE THE WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION

Dockets UE-190529 & UG-190530
Puget Sound Energy
2019 General Rate Case

PUBLIC COUNSEL DATA REQUEST NO. 185:

Re: Financial Assistance Programs.

Please refer to PSE's response to Public Counsel Data Request No. 104, subpart f).

a) Please list the 11 agencies with which PSE works.
b) Does PSE have any plans to work with any additional agencies? If so, please specify.
c) Regarding the statement: "The process to obtain Energy Assistance is complex for customers and involves entities outside of PSE" and to the statement "PSE's ability to recognize and respond faster to customers that need assistance is an important benefit." Please describe in detail the process necessary to obtain Energy Assistance and indicate those steps in the process for which PSE is able to "respond faster."
d) Regarding the statement that "gaining stakeholder input when developing project requirements was critical to ensuring all details were captured" – please list all stakeholders providing input and the way in which such input was sought by and provided to PSE. Please provide any documents, PowerPoints, or other materials associated with the collection and discussion of the 'stakeholder input'.

Response:

a) The 11 Community Action Partnership ("CAP") agencies Puget Sound Energy ("PSE") works with are:

    1. Snohomish County
    2. The Opportunity Council
    3. CAC of Lewis/Thurston County
    4. Byrd Barr Place
    5. HopeLink
    6. Multi Service Center
    7. Pierce County Human Services
    8. Skagit County
    9. HopeSource
    10. Kitsap Community Resources
    11. Metropolitan Development Council.

b) No, PSE does not have any current plans to work with any additional agencies.

c) The overall process has been cumbersome due to the number of phone calls a customer needs to make while seeking assistance. The process in general involves the customer finding the applicable agency, contacting the agency to make an appointment, completing an application, informing PSE that an application has been submitted, receiving confirmation from the agency that the application has been approved, and informing PSE that funds will be coming.

   Please see PSE's Response to Public Counsel's Data Request No. 122(a) for additional details.

d) PSE collaborated with all 11 CAP agencies, including the Washington Department of Commerce. There were various ways PSE sought input and feedback:

   1. **Initial as-is process sessions (in-person)**: The PSE team met with each CAP agency individually to document their as-is process as well as gather agency input on pain points and future state "wish list."
   2. **Kick-off Stakeholder Survey (Online):** In September 2018, an anonymous online survey was sent to agency managers providing an opportunity for stakeholders to give anonymous feedback on project team effectiveness, change management efforts, project confidence and open-ended feedback on the project overall. Attached as Attachment A to PSE's Response to Public Counsel Data Request No. 185 is the Survey Summary.
   3. **Product Demos (in-person & via WebEx)**: The PSE team hosted three product demonstrations that showcased functionality and provided time for feedback on April 10, 2019, July 9, 2019 and July 11, 2019. Attached as Attachments B-E to PSE's Response to Public Counsel Data Request No. 185 are the Product Demo decks that were presented.
   4. **Post Demo Anonymous Online Surveys (in-person & via WebEx)**: An anonymous online survey was sent to each demo participant providing an opportunity for stakeholders to give anonymous feedback on project team effectiveness, change management efforts, project confidence and open-ended feedback on the project overall. Attached as Attachment A to PSE's Response to Public Counsel Data Request No. 185 is the Survey Summary.
   5. **Subject Matter Expert Training July 29 –July 31 (in-person)**: Agency subject matter experts attended a training and were asked to provide feedback throughout training via open discussion, notecards and an online survey. Throughout the training, notecards were made available for providing anonymous feedback and were addressed. An anonymous

online survey was sent following the training providing an opportunity for open-ended comments and feedback. Attached as Attachment A to PSE's Response to Public Counsel Data Request No. 185 is the Survey Summary.

6. **Weekly Agency Check-in Meetings (WebEx)**: Weekly check-ins have been held every Wednesday at 1:30 p.m., beginning on June 26, 2019, and are scheduled to continue through October 31, 2019, and beyond as needed. An additional 9:30 a.m. time was added on September 25, 2019, in response to feedback that a morning time may be better for some agencies. Each check-in included time for feedback and, following the launch, time for defect and enhancement discussion.
7. **Low Income Advisory Committee Meetings (in-person & via WebEx)**: The Energy Assistance ("EA") project utilized this already existing meeting to present the progress of the EA project and open up discussion for feedback and questions. Attached as Attachments F-I to PSE's Response to Public Counsel Data Request No. 185 are the meeting presentations.

ATTACHMENTS A-I to
PSE's Response to
PUBLIC COUNSEL Data Request No. 185

Attachment A to PSE's Response to Public Counsel Data Request No. 185

Energy Assistance Stakeholder Survey Summary

September 2019

Survey Results Comparison

Thank you to everyone who took the time to participate in the 3-question survey following SME Training at the end of July. Here is a look at the results as compared to past surveys.

How likely do you think the PSE project team will deliver a customer-centric capability that will add value to the PSE HELP application process?

- September 2018: 3.5
- April 2019 Post Demo 1: 4.1
- July 2019 Post Demos 2 & 3: 3.5
- July 2019 SME Training: **4.0**

I understand the overall vision and objectives of this project.

- September 2018: 3.83
- April 2019 Post Demo 1: 3.92
- July 2019 Post Demo 2 & 3: 3.9
- July 2019 SME Training: **4.2**

Based on SME Training, I am confident in the new Energy Assistance Tool.

- September 2018: N/A
- April 2019 Post Demo 1: 3.7
- July 2019 Post Demo 2 & 3: 3.1
- July 2019 SME Training: **3.7**

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What We Heard in SME Training Survey Comments

To Paraphrase

- Have patience when we ask questions--this will have a significant impact on our daily routine!
- The trainers were very good.
- Scheduling should have been a separate training.
- It would have been preferable to see more of the changes we recommended.
- Great job with the tool in a small amount of time.
- A lot of features appear to be irrelevant to the upload agencies as most of the features are designed for the files originated from PSE EnergyHelp tool.
- Some suggestions are essential to a usable and valuable system. Especially the billing history data layout and export fields.
- Some features could have been shared with the upload agency group earlier than today to get feedback before it was too late to request changes.
- Continue to provide assistance and communicate the objective of the project

Changes in Response to Survey Feedback

- ✓ Added one-on-one meetings with agencies to carefully go through each agency's individual processes.
- ✓ We have reviewed all suggestions and recommendations and have processed those we could prior to launch such as 12-month consumption layout and mandatory contact information fields . For the remaining we have added to an enhancements list and are actively seeking out additional funding to pursue these.
- ✓ We've adjusted the timing of the weekly meetings to accommodate more agencies so that we have a weekly opportunity to discuss the project, address concerns and keep everyone updated on upcoming changes.
- ✓ Ensure end-user trainings are supported by a subject matter expert and that trainees have plenty of opportunity to ask questions and provide feedback.
- ✓ Following up end-user training with an opportunity to provide anonymous feedback.

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Attachment B to PSE's Response to Public Counsel Data Request No. 185

Welcome!

Please make yourself comfortable.
Help yourself to coffee and snacks.

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Energy Assistance Portal

Demo 1 of 3

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Agenda

- Welcome & Agenda Review
- Safety Moment
- Recap of Goals of the Energy Assistance Project
- Agency Participation & Feedback
- **Demo**
- Demo Feedback
- On the Horizon

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Speaker: Suzanne

SAFETY

Safety Moment

Know what's below. Call before you dig.

- ✓ There are millions of miles of **buried utilities** beneath the surface of the earth that are vital to everyday living like water, electricity and natural gas.
- ✓ 811 is the phone number you call **before digging** to protect yourself and others from unintentionally hitting underground utility lines.
- ✓ **Call 811** at least a few days before you start any digging project. Whether you are planning to do it yourself or hire a professional, smart digging means calling 811 before each job.

811®
Know what's below.
Call before you dig.

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Energy Assistance Project Vision

Energy Assistance hypothesis predicts that introducing the third-party appointment setting software will result in an increase in self-service options and increased transparency between PSE, local agencies, and PSE customers. The third-party platform, serviced by Avertra, will allow customers the ability to set their own appointments, provide customers with basic knowledge about the Energy Assistance program, allow PSE to view appointment details, and inform PSE of pledge details upon entry.

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Speaker: Suzanne

Energy Assistance Goals and Benefits

Customer

- **Increased** opportunity for reminders
- Improved **customer experience**
- **New** self-serve options for customers

Agency

- More **robust transparency** into needed customer information
- **Enhanced** agency self-serve with system access

PSE

- **Increased participation** in PSE HELP
- Improved **customer experience**

Energy Assistance Applications

- **More** gas **customers served**
- **More** electric **customers served**
- **Identify more** customers **in need**
- Customer submits **eDocumentation**

Pledges

- Customer **pledge & pay status view**
- Application status **transparency**
- **Improved communications** to customers (Email & SMS options)

Appointments

- Agency **schedule automations**
- Easy **reschedule** automation
- **Reminders** via **email & SMS**
- **Customer** self service

Information

- More **customer** information
- More **location** information
- More **account** information

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Speaker: Suzanne

Demo Leaders

Veronica Elze

Veronica has worked periodically with Avertra since 2012 and primarily in utilities since 2004. She lives in an off grid community in the mountains of Eastern Washington state. Her favorite food is sushi. She loves flowing water, waterfalls in particular, and trying new things.

Ron Kratz

Ron has been working for Avertra for over 4 years. He lives near Dallas, Texas with his loving dogs. His favorite food is a hamburger. He is also a member of the search and rescue organization called Civil Air Patrol.

Agency Participation & Feedback

We appreciate and value your feedback. We have collaborated with you to understand your needs and tailored the solution to better serve you and provide our customers with a good experience.

As we go through the demo please:

- Ask questions during **scheduled pauses** identified by the Demo Leaders
- Take notes on any feedback or concerns you have so we can address them:
  - **Submit anonymously** by dropping note cards in the suggestion box
  - Verbally ask during time allotted for feedback **after the demo**

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Speaker: Laura

Demo – User Management

Supervisors will have an opportunity to create, deactivate, & reactivate users on demand. The PSE Administration team will monitor and support.

As-Is (Current)

- Lengthy IAM Process
- Limited Users
- SAP Web IC Interface
- VDI Token(s)
- Manual PSE Notification

To-Be (Demo)

- Add New User
- Verify Existing User
- Deactivate / Reactivate
- Move to New Agency

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Speaker: Quan

Demo – Task Management

Collaborate and track tasks **securely** with other CAPs, the PSE Administration team, and within your own organization without needing a contact list.

As-Is (Current)

- Tasks Tracked in Email
- Phone Call Communication
- Account Information Communicated Over Insecure Channels

To-Be (Demo)

- Create Task
- Assign Task
- Close Task

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Speaker: Quan

Demo – Customer Search

After **quickly** locating and verifying the right Contract Account, you can open directly to assistance-specific data.

As-Is (Current)

- SAP Web IC Search Fields
- SAP Web IC Customer Pages
- SAP Web IC Location and Usage Information

To-Be (Demo)

- Customer Search
- Location Search
- View Customer Info

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Demo – Correspondence

Opportunity to customize Emails & SMS templates to fulfill recurring process and ad-hoc needs.

As-Is (Current)

- Individual Email
- No SMS
- Manual Correspondence

To-Be (Demo)

- Template Creation
- Automated Messaging
- Send to Group

Speaker: Quan

Demo Feedback

- Any initial thoughts or feedback you would like to **discuss** here today?
- Please feel free to **email** Suzanne at anytime
- Please submit **anonymous** feedback in the suggestion basket
- Please participate in the follow-up **survey** sent to you electronically

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Speaker: Laura

On the Horizon

April - June

- Monthly Newsletter
- Development & Testing
- Welcome Packet June 24th

July 9-11

- Demo 2
  - Recap of Demo 1
  - Application Management
- UAT
- SME Training
- July 12 reserved as overflow day

July 22-25

- Demo 3
  - Scheduling
  - Fund Management
  - Report Extract Generator
- UAT
- SME Training
- July 26 reserved for overflow day

August 6-23

- Demo 4
  - Customer Self-Service
- End User Training

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Speaker: Suzanne

Thank you for your time!

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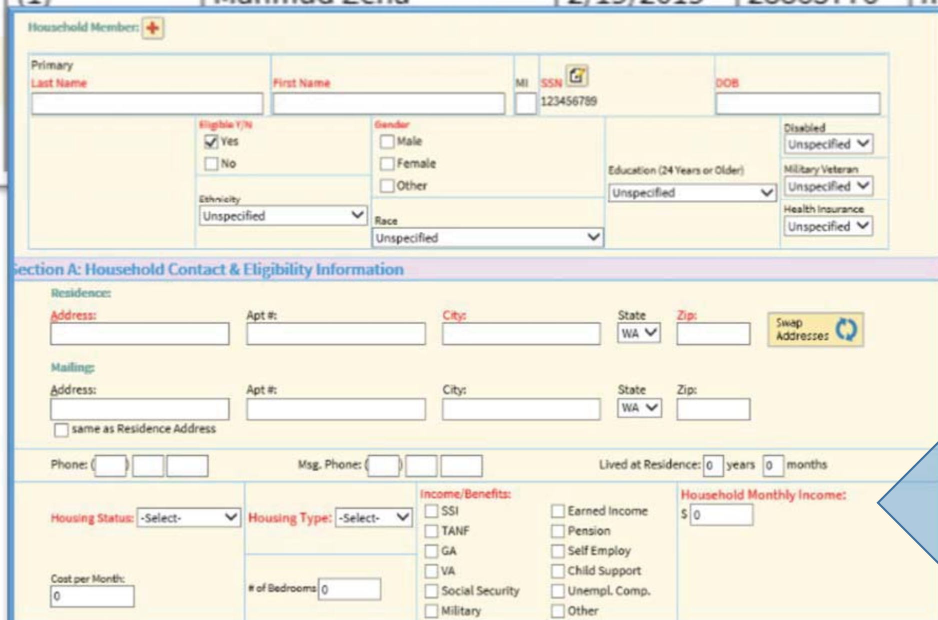
LIHEAP Site PSE HELP **Button to EA Portal**

Agy	Cnty	Primary SSN	Secondary SSN	Name	Cert Date	ID	Modified Last By	Services Paid	Action
56	17	3009	(1)	Test Client	3/4/2019	28863777	michelled		
69	34	2121	(1)	Mahmud Zena	2/19/2019	28863776	michelled	PSE: 307.00	
69	21	9639					elindaq	EAP: 585.00	
63	14	5638					istin H	EAP: 223.00	



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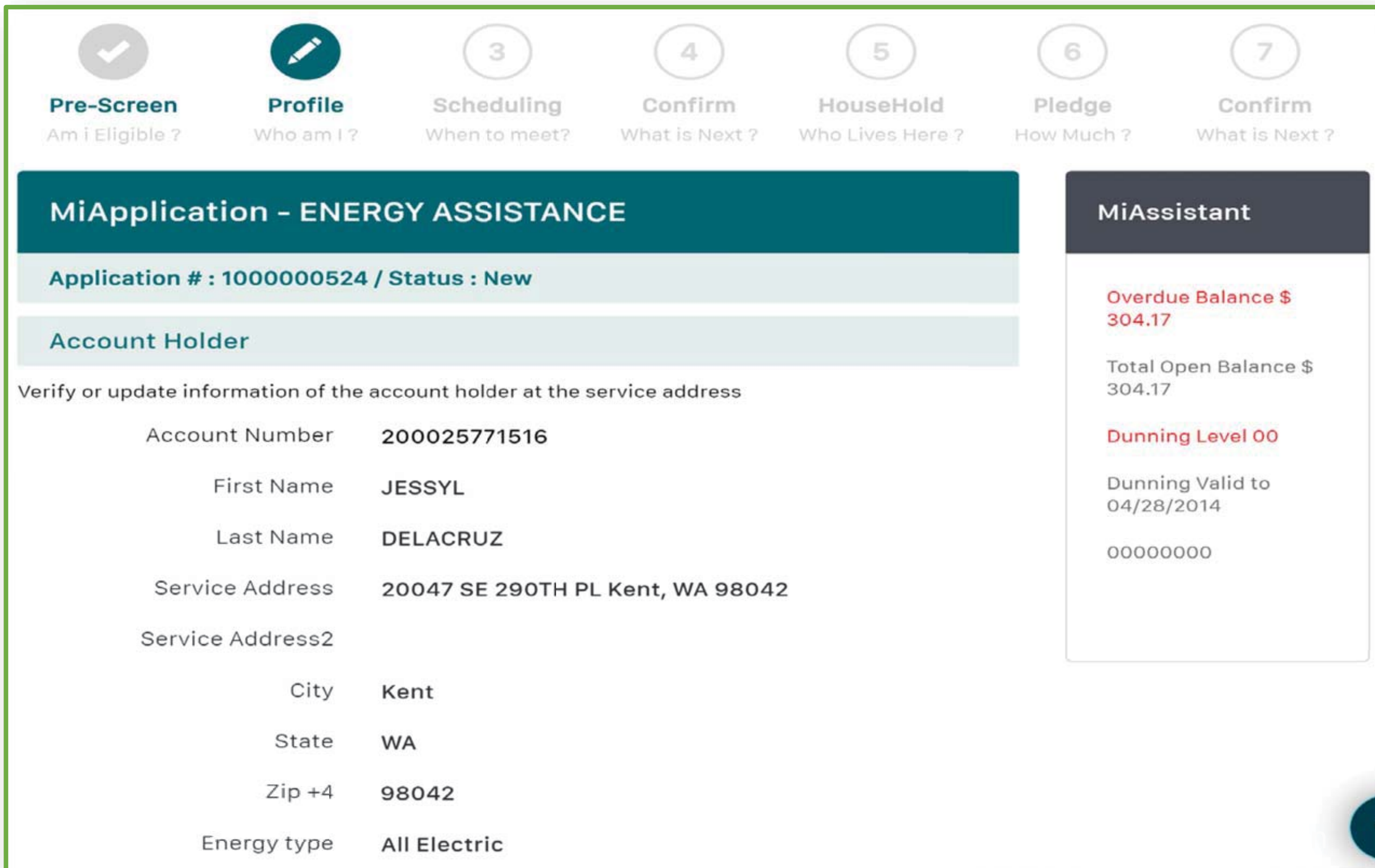
Pre-Filled PSE HELP Application - No Duplicate Entry



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Attachment C to PSE’s Response to Public Counsel Data Request No. 185

Welcome!

Please make yourself comfortable.
Help yourself to coffee and snacks.

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Energy Assistance Portal

Demo 2 of 3

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Roll Call

Byrd Barr Place

CAC of Lewis/Mason/Thurston Counties

Community Action of Skagit County

Hopelink

HopeSource

Kitsap Community Resources

Metropolitan Development Council (MDC)

Multi-Service Center (MSC)

Pierce County Human Services

Snohomish Human Services

The Opportunity Council

Energy Project

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Agenda

- Welcome & Agenda Review
- Safety Moment
- Recap of Goals of the Energy Assistance Project
- Agency Participation & Feedback
- **Demo**
- Demo Feedback
- On the Horizon

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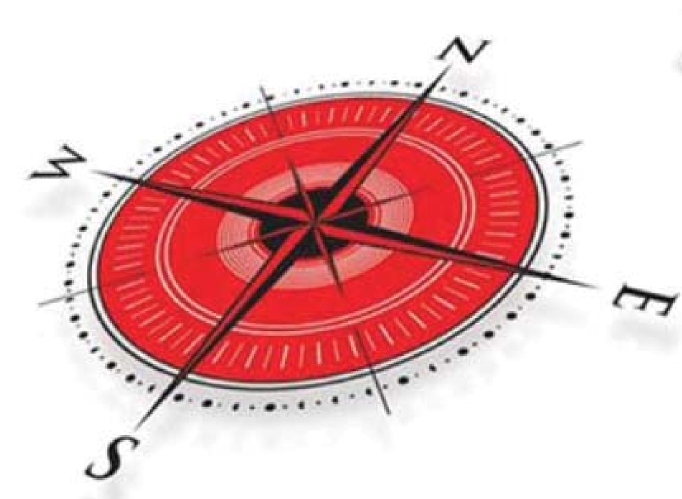
Safety Moment—Vehicle Trip Safety

- ✓ Tell your friends, family or co-workers where you're going, the route you're taking and when you plan to arrive.
- ✓ Get information in advance on the upcoming weather and how that might affect road conditions and travel time.
- ✓ Always keep water, non-perishable snacks, practical shoes and an all-weather coat in your car's emergency kit.
- ✓ If your vehicle becomes disabled, stay with it.



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Energy Assistance Project Vision

The Energy Assistance Project aims to increase self-service options for customers seeking energy assistance by introducing a third-party tool, EnergyHelp. EnergyHelp, serviced by Avertra, provides the following benefits to customers:

- ✓ Basic knowledge about the Energy Assistance program,
- ✓ Allows customers to prescreen to see if they are qualified,
- ✓ Supplies contact information for Community Action Agencies so that customers can set appointments
- ✓ Provides an option for customers to self-report their appointments online through EnergyHelp
- ✓ Offers customers the ability to track their pledge

The EnergyHelp tool will increase transparency between PSE, local agencies, and PSE customers resulting in a better customer experience, a reduction in call volume related to the PSE HELP program and increased access to PSE HELP funds.

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Agency Participation & Feedback

We appreciate and value your feedback. We have collaborated with you to understand your needs and tailored EnergyHelp to better serve you and provide our customers with a good experience.

As we go through the demo please:

- Ask questions during **scheduled pauses** identified by the Demo Leaders
- Take notes on any feedback or concerns you have so we can address them:
  - ➢ **Submit anonymously** by dropping note cards in the suggestion box
  - ➢ Verbally ask during time allotted for feedback **after the demo**

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Reminder of Our Demo Leaders

Veronica Elze

Veronica has worked periodically with Avertra since 2012 and primarily in utilities since 2004. She lives in an off grid community in the mountains of Eastern Washington state. Her favorite food is sushi. She loves flowing water, waterfalls in particular, and trying new things.

Ron Kratz

Ron has been working for Avertra for over 4 years. He lives near Dallas, Texas with his loving dogs. His favorite food is a hamburger. He is also a member of the search and rescue organization called Civil Air Patrol.

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Recap of Demo #1 (04/10/2019)

- User Management (Create, Update, De/Activate, Passwords)

  Supervisors will have an opportunity to create, deactivate, & reactivate users on demand while the PSE Administration team will monitor and support.

- Customer Search (by Location or Customer)

  After locating and verifying the right Contract Account quickly, you can open directly to assistance-specific data.

- Task Management (Individual/Shared Tasks, to/from PSE)

  Collaborate and track tasks with other CAPs, the PSE Administration team, and within your own organization without needing a contact list.

- Correspondence (Auto/Manual Email, SMS)

  Opportunity to customize Emails & SMS templates to fulfill recurring process and ad-hoc needs.

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Demo #2 Agenda

5 Scenarios will be shared including the following topics:

- Typical Household Application
- An Application With A Co-Customer As The Applicant
- Overqualified Applicant
- Customer on Life Support & Missing Documentation
- Disconnected Customer

Scenario 1

Typical Household Application

- Direct vs. Upload entry points
- Start at the LIHEAP application (as-is) then click on the new PSE HELP button in Commerce
- Application Wizard
- Briefcase (Pledgelist & Paylist)

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New PSE HELP Button

The new PSE HELP button on the Commerce site will automatically transfer the user to the EnergyHelp tool while copying the applicable LIHEAP information to the PSE HELP application in the background. Only an initial User Login is required.

As-Is (Current)

- LIHEAP Application must be filled out first
- Old PSE HELP button copies the HIF
- The LIHEAP and PSE HELP applications are then managed separately

To-Be (Demo)

Basic HIF is Copied

User is taken to EnergyHelp

Application is Prefilled

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The Application Wizard

The new Application Wizard will guide the user through the stages capturing information from the customer while prefilling and validating the entered data with SAP data.

As-Is (Current)

- All information is on one screen
- Information is saved at the end
- Information is manually entered
- Information is not verified against SAP

To-Be (Demo)

- Each Step is Saved
- Logical Process Flow
- Information is Prefilled
- Data Validation

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The Briefcase

The application briefcase will be used by Intake Workers, Supervisors, and PSE Admins to manage a collection of active applications and their statuses. The briefcase will also replace the Pledgelist and/or Paylist with a more robust workflow management.

As-Is (Current)

- Search for applications by limited criteria
- Must generate and transmit the pledgelist and paylist by email (which is less secure)
- Logical grouping is manual
- No status on applications

To-Be (Demo)

- Additional Search Criteria
- Flexible Grouping
- Status Controlled Actions
- Workflow Transparency

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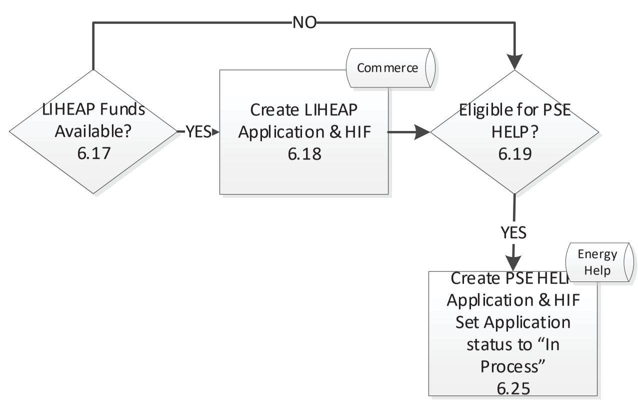
Scenario 2

An Application With A Co-Customer As The Applicant

- Customer Search/Verification/Overview
- View Household's Past Benefit Received and Applicant's Current Eligibility
- Standalone PSE HELP application
- List of Co-Customers eligible to be an applicant



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New Standalone PSE HELP Application

A standalone PSE HELP application can be started on the new EnergyHelp tool directly. This scenario is applicable when LIHEAP funds are not available. Information will still be prefilled using SAP data.

NOTE: This scenario will be the most applicable during the Aug 24th to Oct 1st period.

As-Is (Current)

- Standalone PSE HELP applications must be started from the Commerce site
- Information is entered manually

To-Be (Demo)

- Search/Validate Customer
- Data is Prefilled from SAP
- Consumption Data Shown
- Enter Heat Cost Manually

Determining Eligible Applicants

According to PSE HELP program rules, the applicant must be a Co-Customer. However, they may not show up on the bill today, leading to additional verifications with PSE. In EnergyHelp, all Co-Customers are shown.

As-Is (Current)

- Only primary and up to 3 Co-Customer are shown on the bill
- Must verify with PSE before proceeding if not shown on the bill

To-Be (Demo)

- Relationships to Primary
- Eligible Co-Customers
- Choosing the Applicant

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Scenario 3

Overqualified Applicant

- Household Income Types & Amounts
- Status Management

Household Income Collection

Each Agency will be able to configure the income types they keep track of, and on each application, provide granular amounts for each income type. This allows the Intake Workers to collect all income sources and better evaluate eligible pledge amounts.

As-Is (Current)

- Commerce configures which income types are collected
- Income amount is collective of all income sources

To-Be (Demo)

- Income Types
- Income Amounts Per Type
- Total Income Calculated

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Status Management

Statuses will be used to communicate and group applications based on their stages and outcomes. They can also be mass changed (in the briefcase) and reported upon.

As-Is (Current)

- No status on applications
- No status workflow
- Minimal tracking of application outcomes

To-Be (Demo)

- Statuses & Visibility
- Workflow Management
- Mass Change
- Reporting

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Status Management

Status	Description
Mailed Out	When a PSE HELP app is mailed out to a customer – Manual
New	After Customer information step – Automatic
Scheduled	Status on Appointment Confirmation screen
In Process	Status at Household screen of wizard
Missing Docs	Arrives missing docs and is not rescheduled – Manual (Default dunning rules apply)
Rescheduled	Has been rescheduled (auto-manual)
Missed Appointment	Does not come into an appointment – Manual
Canceled	Any reason that is not covered by another status and the application will no longer be considered active or viable. (e.g., moved out of the area, an appointment is canceled) – Manual
Denied	When a PSE HELP application is Denied– Manual
Under Review	Assigned to an individual at the Agency to review the application, Ready to go on Pledge list– Manual
SAP Pledged	When PSE has created the pledge in SAP on Customer account - Manual
Approved	Approved and is ready to be added to a Pay List – Manual
SAP Paid	When PSE has converted the pledge to paid in SAP on Customer account - Manual
On Hold	Other options do not apply, yet the application cannot proceed (e.g., Internal Agency Reason). All dunning rules apply (extensions combined must not exceed total). Manual Duration Value.

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Scenario 4

Customer on Life Support & Missing Documentation

- Alerts
- Account Holds

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Customer Alerts

Alerts on the Customer Overview in EnergyHelp will help each Intake Worker take the appropriate actions. These alerts come from various sources, including PSE's SAP system.

As-Is (Current)

- Alerts are available in various screens in Web IC
- Alerts are not always prioritized and applicable to the application process

To-Be (Demo)

- View Customer Alerts
- Take Appropriate Actions

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Account Holds

Account holds are automatically placed according to PSE's business rules regarding appointments and their associated application statuses. They can also be placed manually by Agencies while still following PSE's business rules.

As-Is (Current)

- Customer must call PSE to report an appointment
- Agencies must contact PSE if application processing takes additional time to collect documentations
- Business rules for account holds are managed and communicated manually

To-Be (Demo)

- Denote Application Status
- View Account Hold
- Change Account Hold

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Scenario 5

Disconnected Customer

- Determining Active and Disconnected Accounts

Determining Active and Disconnected Accounts

If a Customer has an account that has been disconnected, their pledge must be put on an active account. In the EnergyHelp system, the user is able to determine if a Customer has a disconnected account. They can also see that the Customer has reconnected and use the new account to process the application.

As-Is (Current)

- Manual verification of reconnection
- Manually determining the correct account to use

To-Be (Demo)

- View Disconnected Account
- Switch to New Account
- Create Application

Discussion

What are your initial thoughts following demo #2?

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On the Horizon

Welcome Packet	• Look for your packet via email on July 9 (during demo #2) • Packet will include location, schedule, parking access and meal information for SME training
Demo #2	• Tuesday, July 9 (in person preferred, WebEx available)
Demo #3	• Thursday, July 11 (in person preferred, WebEx available)
SME Training Direct Entry Agencies	• July 29 through July 30 (in person)
SME Training Upload Agencies	• July 31 (in person)
Train-the-Trainer Optional	• One-day training, with options for either August 1 or August 5

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Thank you for your time!

PSE PUGET SOUND ENERGY

Attachment D to PSE's Response to Public Counsel Data Request No. 185

Welcome!

Please make yourself comfortable.
Help yourself to coffee and snacks.
Wifi SSID: PSE_GUEST, Password: mtv8vh9b

PSE PUGET SOUND ENERGY

Energy Assistance Portal

Demo 3 of 3

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Agenda

- Welcome & Agenda Review
- Safety Moment
- Recap of Goals of the Energy Assistance Project
- Recap of feedback from demo #2
- Agency Participation & Feedback
- **Demo**
- Demo Feedback
- On the Horizon

Safety Moment—Securing Loads

Summer is a prime time for yard work and house projects. These endeavors can result in the need for donation and dump runs. Failing to secure loads can cause loads of trouble including serious injury, loss of license, tickets and fines. You are responsible for avoiding any **leaking, spilling, blowing, falling and blocking**. Before you drive with a load make sure to check the following:

✓ Cargo weight, height and width

✓ Tie-down ratings, numbers and applications

✓ Anchor points

✓ Tarps and covers

✓ Cargo bed debris and tool removal

✓ Pre-inspection of your vehicle and then recheck inspection before you being driving.

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Energy Assistance Project Vision

The Energy Assistance Project aims to increase self-service options for customers seeking energy assistance by introducing a third-party tool, EnergyHelp. EnergyHelp, serviced by Avertra, provides the following benefits to customers:

- ✓ Basic knowledge about the Energy Assistance program,
- ✓ Allows customers to prescreen to see if they are qualified,
- ✓ Supplies contact information for Community Action Agencies so that customers can set appointments
- ✓ Provides an option for customers to self-report their appointments online through EnergyHelp
- ✓ Offers customers the ability to track their pledge

The EnergyHelp tool will increase transparency between PSE, local agencies, and PSE customers resulting in a better customer experience, a reduction in call volume related to the PSE HELP program and increased access to PSE HELP funds.

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Reminder of Participation & Feedback Opportunities

We appreciate and value your feedback. We have collaborated with you to understand your needs and tailored EnergyHelp to better serve you and provide our customers with a good experience.

As we go through the demo please:

- Ask questions during **scheduled pauses** identified by the Demo Leaders
- Take notes on any feedback or concerns you have so we can address them:
  - ➢ **Submit anonymously** by dropping note cards in the suggestion box
  - ➢ Verbally ask during time allotted for feedback **after the demo**

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Speaker: Laura

Demo #2 Feedback

"When the magic button was clicked, it showed income from LIHEAP site, why were we being asked to enter it again? Shouldn't it pull amounts and selected types? Or is this info only pre-screen?"

"If you are clicking from an existing LIHEAP app, the income should already be pulled and not have to be entered again."

Next Steps: The amount does come over. Due to the technical challenges during demo #2 the field, which initially came over, disappeared when the error message came up. We will review this again so that you can see how the income is pulled over automatically.

"The income types in EnergyHelp do not currently match LIHEAP--missing child support, pension, others as well."

"Income breakdown--VA, TANF, child support, SSI, social security benefits."

"For income--we don't want to have to enter a dollar amount for each type of income, we just want to select types of income and add a total."

Next Steps: The is valuable feedback. Quan is owning the research behind this and we will update you at one of our weekly meetings.

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Demo #2 Feedback Continued

"Option to gather customer email for additional comm purposes"

"Email--is it required before we can move forward? What if a client does not have an email?"

"Phone # option box if no email maybe phone # available"

Next Steps: This was really great feedback and we are already working on a longer term solution. It has being added to the post go-live enhancements list. It will require some regression testing and we need to determine timing so as not to impact our launch date but we will report back during an upcoming weekly meeting on the solution and timeline. In the meantime, we will establish a work-around with a dummy email/phone number for go-live.

"Pay list?“

Next Steps: This is important! While we are still working on the process rules of how the pay list will work, we will present one probable solution during today's demo.

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Demo #2 Feedback Continued

"If customer logs into PSE.com and inputs they have an appointment will it automatically put a hold on their account?"

Next Steps: Yes, if the appointment day, time and account status meet business rules.

"Will the agency be contacted to confirm the appointment?"

Next Steps: Business will determine the frequency of any audit process for appointments, just as it is today when a customer calls in to report an appointment.

"Any step past current requirements in a HIF should be optional, e.g. multiple incomes/types being required, email being required, other non-necessary steps/info, required field. We often don't have time for extra steps, especially mid-season as a PSE HELP application is already adding considerable time to an interview."

Next Steps: This is very good feedback and we understand the complexity of your work and the time constraints you work within. We are determining the best place to capture information inside EnergyHelp but will not capture any additional information than is required today.

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Reminder of Our Avertra Demo Leaders

Veronica Elze

Ron Kratz

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New PSE HELP Button

The new PSE HELP button on the Commerce site will automatically transfer the user to the EnergyHelp tool while copying the applicable LIHEAP information to the PSE HELP application in the background. Only an initial User Login is required.

As-Is (Current)

- LIHEAP Application must be filled out first
- Old PSE HELP button copies the HIF
- The LIHEAP and PSE HELP applications are then managed separately

To-Be (Demo)

- Basic HIF is Copied
- User is taken to EnergyHelp
- Application is Prefilled

Pledge List & Pay List

The application briefcase will be used by Intake Workers, Supervisors, and PSE Admins to manage a collection of active applications and their statuses. The briefcase will also replace the Pledge List and/or Pay List with a more robust workflow management.

As-Is (Current)

- Search for applications by limited criteria
- Must generate and transmit the Pledge List and Pay List by email (which is less secure)
- Logical grouping is manual
- No status on applications

To-Be (Demo)

- Additional Search Criteria
- Flexible Grouping
- Status Controlled Actions
- Workflow Transparency

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Energy Assistance Portal

Quick Break

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Status Management

Statuses allow for each application's progress to be tracked and communicated by the parties involved. When applications are put into certain statuses, they trigger business rules and follow-up actions.

As-Is (Current)

- Statuses are manually communicated
- Meaning of each status is not standard
- Required follow-up action not clear
- Business rules manually enforced

To-Be (Demo)

- Business Rule Activation
- Status Tracking
- Follow-Up Actions

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Customer Pre-Screen

PSE customers will be able to pre-screen for their potential qualification and locate their appropriate agency based on their service zip code. They provide contact information that will be used throughout the application lifecycle. Their pre-screen and contact information is tracked by both PSE and their determined agency.

As-Is (Current)

- Potential customers are not known until they make an appointment
- No way to follow-up with potentially qualified customers without appointments
- Customers need to look up agency information manually

To-Be (Demo)

- Customer Enters Process
- Contact Info is Captured
- Agency Determined
- Stored Pre-screen Info

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Customer's Status View

PSE customers with an authenticated login will be able to see selected application statuses (Direct only) and current/past pledges. They are able to report and view their appointments.

As-Is (Current)

- Customers must call either their agency or PSE to track their application and pledge statuses
- Customers must wait for their bill to be sure of their pledges

To-Be (Demo)

- Customer's Portal
- Application Progress
- Report Appointment
- Current & Past Pledges

Discussion

What are your initial thoughts following demo #3?

On the Horizon

✓ **Welcome Packet**	• Look for your packet via email on July 9 (during demo #2) • Packet will include location, schedule, parking access and meal information for SME training
✓ **Demo #2**	• Tuesday, July 9 (in person preferred, WebEx available)
✓ **Demo #3**	• Thursday, July 11 (in person preferred, WebEx available)
SME Training Direct Entry Agencies	• July 29 through July 30 (in person)
SME Training Upload Agencies	• July 31 (in person)
Train-the-Trainer Optional	• One-day training, with options for either August 1 or August 5

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Thank you for your time!

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Attachment E to PSE's Response to Public Counsel Data Request No. 185

Energy Assistance Portal

Scheduling Demo

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Agenda

- Welcome
- Agenda Review
- **Demo**
- Demo Feedback
- On the Horizon

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Scheduling Functionalities

Agency's Scheduling Configurations	
Slot Generation	
Agency Scheduling – Normal Slot	
Agency Scheduling – Emergency Slot	*As Time Permits*
Customer's Self-Service Scheduling – Automatically Assigned Slots	*As Time Permits*
Customer's Self-Service Scheduling – With Date/Time Preference	
Confirmation & Reminder Template and Emails Automatically Sent	*As Time Permits*
Agency Scheduling – Changing an Appointment	*As Time Permits*
Non-PSE Appointment	
Reassign Appointment To Another Personnel	*As Time Permits*

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Agency’s Scheduling Configurations

Agency Work Days	
Agency Work Hours	
Public Holidays	
Unexpected Days Off	*As Time Permits*
Additional Work Hours	*As Time Permits*
Appointment Length	
Emergency Appointment	
Day Open For Booking	
Verify Intake Workers Are Available For Scheduling	*As Time Permits*

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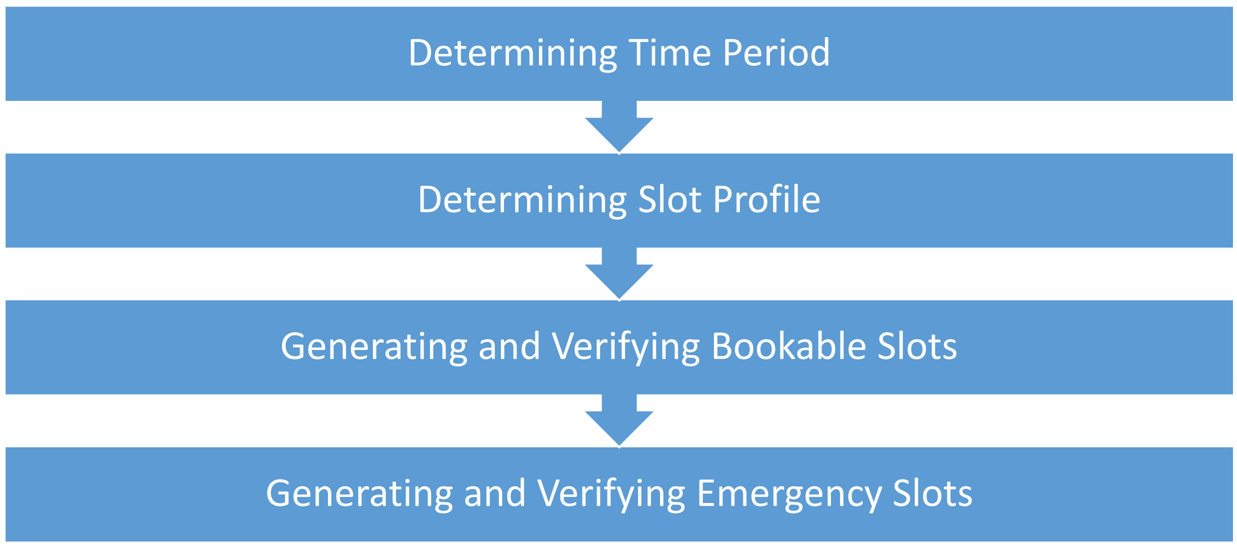
Slot Generation



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Agency Scheduling – Creating an Appointment

Create New Standalone PSE HELP Application

↓

Viewing Available Slots

↓

Picking and Confirming an Appointment

Agency Scheduling – An Emergency Appointment

Verify Customer is in Emergency Needs

↓

Create New Standalone PSE HELP Application

↓

Viewing Available Emergency Slots

↓

Picking and Confirming an Appointment

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Customer's Self-Service Scheduling – Automatically Assigned Appointment

Customer Pre-Screens for an Agency using EnergyHelp Scheduler

↓

Next Available Appointment Is Given

↓

Customer Picks the Appointment

↓

Customer's Dashboard Shows Appointment Date/Time

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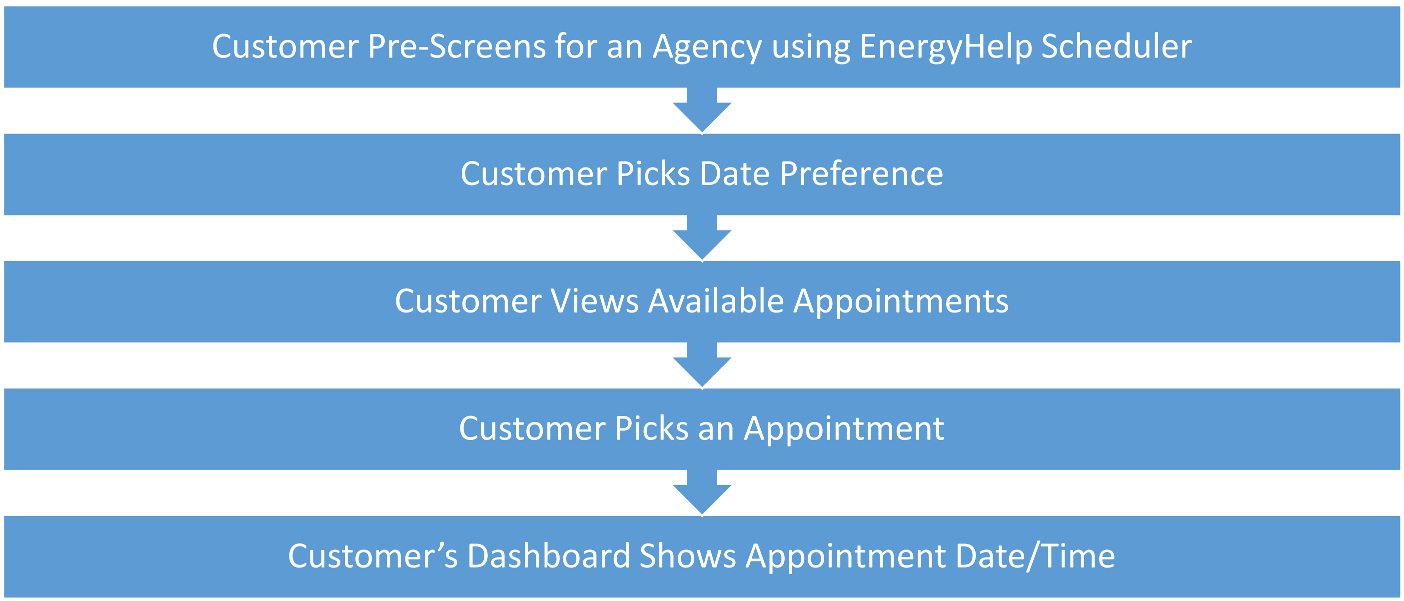
Customer's Self-Service Scheduling – With Date/Time Preference



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Confirmation & Reminder

Confirmation & Reminder Templates

Once an Appointment is Booked, Confirmation is Sent

Reminder is Automatically Sent Before Appointments

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Agency Scheduling – Changing an Appointment

Edit Existing Appointment Date/Time

↓

View Available Rescheduling Appointment

↓

Pick Another Available Appointment

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Reassign Appointment To Another Agent

View and Edit an Existing Appointment

View Open Appointment Assigned to Another Person

Pick an Appointment

Verify Appointment Has Been Reassigned

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Non-PSE Appointment

View Calendar of Agent Availability

Recording an Unlinked Appointment From the Launch Pad

View Blocked Time on Agent Calendar

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Discussion

What are your initial thoughts following the Scheduling demo?

On the Horizon

✓ Demo #2	• Tuesday, July 9 (in person preferred, WebEx available)
✓ Demo #3	• Thursday, July 11 (in person preferred, WebEx available)
SME Training Direct Entry Agencies	• July 29 through July 30 (in person)
SME Training Upload Agencies	• July 31 (in person)
Train-the-Trainer Optional	• One-day training, with options for either August 1 or August 5
End-User Training	• Agency SME's will train their coworkers with support from PSE (onsite at agency locations)

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Thank you for your time!

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Attachment F to PSE's Response to Public Counsel Data Request No. 185

PSE Low Income Advisory Committee Meeting

May 2019

Agenda

- Check-in of Members
- Safety Moment
- PSE Programs: Update on the PSE HELP Program YTD
- PSE Local Office Closures
- PSE GTZ EA Project Update
- HELP Two-Year Certification
- AMI Opt-Out –Schedule 171
- Regulatory Update - Nate Hill
- HELP Income Guidelines, Jing Liu
- Clean Energy Bill
- Agenda Items for Next Meeting

Safety Moment - Portable Ladder Safety

Falls from portable ladders (step, straight, combination and extension) are one of the leading causes of fatalities and injuries. Here are some tips to stay safe while working on a ladder.

Read and follow all labels/markings on the ladder.
Avoid electrical hazards! – Look for overhead power lines before handling a ladder. Avoid using a metal ladder near power lines or exposed energized electrical equipment.
Always maintain a 3-point (two hands and a foot, or two feet and a hand) contact on the ladder when climbing. Keep your body near the middle of the step and always face the ladder while climbing.

Source: OSHA

PSE PUGET SOUND ENERGY

PSE HELP Update

Expenditure as of 5/13/19

- 60.5% of PSE HELP Electric dollars spent ($8,822,105/ $14,584,025)
- 39.1% of PSE HELP Gas dollars spent ($1,481,384/ $3,791,910)

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PSE Local Office Closures

7 business offices in PSE territory will be closing in August 2019: Bellingham, Ellensburg, Olympia, Oak Harbor, Freeland, Tacoma, Vashon Island

Reasons:

- Fewer customers using PSE’s local offices
- Changing needs
- Added online and mobile bill payment and customer service tools

PSE GTZ EA Project Update

Vision

Energy Assistance Hypothesis predicts that introducing the third-party appointment setting software will result in an increase in self-service options and increased transparency between PSE, local agencies, and PSE customers. The third-party platform, serviced by Avertra, will allow customers the ability to set their own appointments, provide customers with basic knowledge about the Energy Assistance program, allow PSE to view appointment details, and inform PSE of pledge details upon entry.

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Upcoming Milestones

- May – July: Internal UAT, demo and training preparations
- July 9: Agency Demo #2
- July 11: Agency Demo #3
- July 29 through July 31: SME Training
- August 1 and August 5: Optional Train-the-Trainer
- August 6 - August 23: End User Training (onsite with agencies)
- August 24: Initial Deployment

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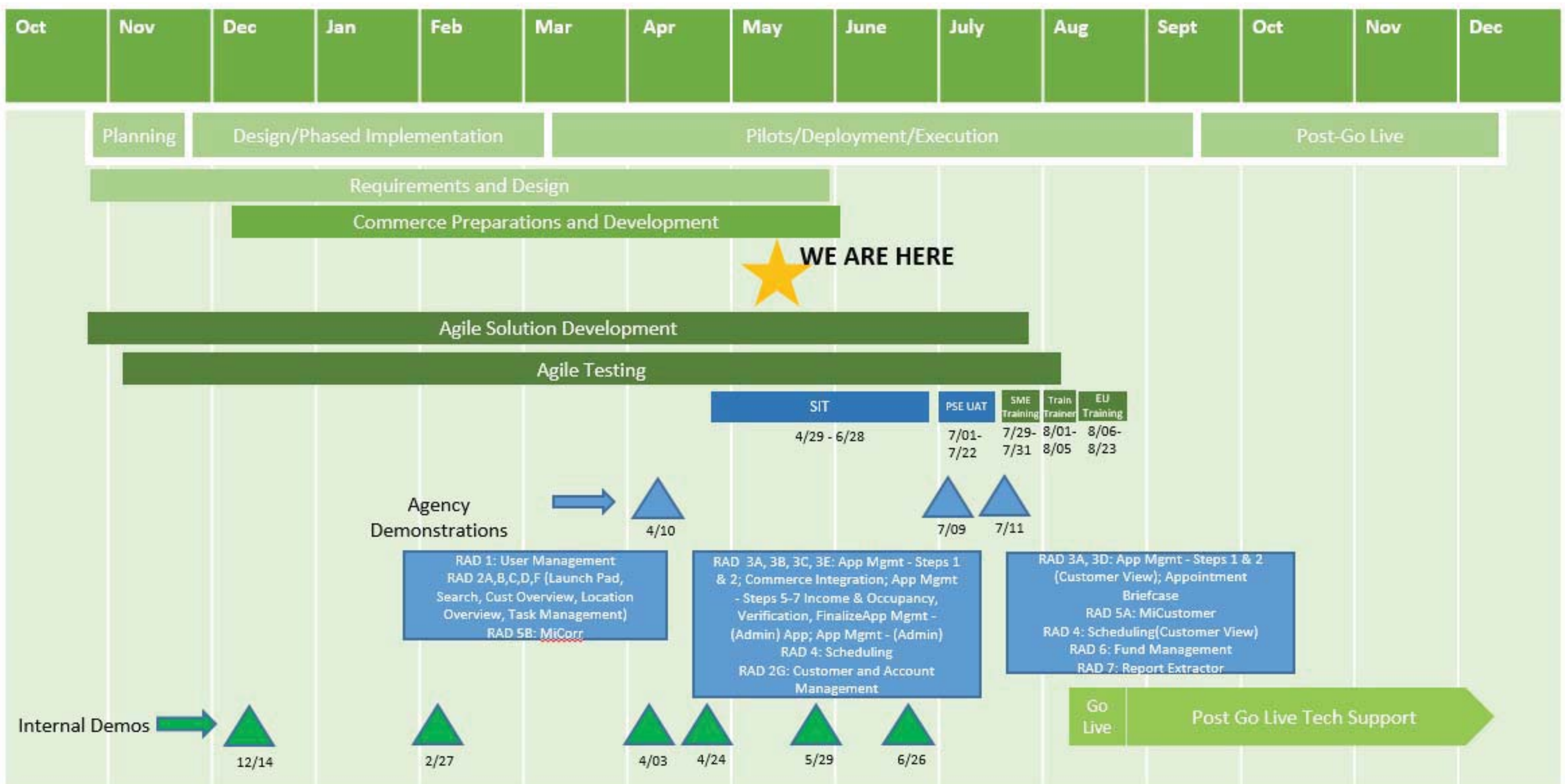
Energy Assistance Project Timeline



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Post Demo Survey Results

Agency SMEs, as well as Suzanne's team, were surveyed initially in September, 2018 and again following Demo #1 in April 2019.

- 11 questions.
- 12 respondents in 2018 and 2019
- Scale of 1 to 5, with 5 being the highest.
- The 2019 average score went up slightly to 3.98 from 3.96 in September 2018.

.

Questions Showing Improvement

Scores increased in 6 of the 11 questions:

A. The PSE project team has taken adequate time and appropriate steps to prepare me for the planning and design journey.

B. The PSE project team uses methods of communication appropriate to my needs.

C. The PSE project team welcomes my feedback, whether positive or negative.

D. The PSE project team is honest, even when the news is not good.

E. How likely do you think the PSE project team will deliver a customer-centric capability that will add value to the PSE HELP application process?

F. I understand the overall vision and objectives of this project.

The most significant increase was in question E above. Showing a .58 or 12.5% rise. This was the lowest scoring question in the 2018 survey but tied with two others for the third highest scoring question in 2019.

Questions Showing Decline

Scores decreased in 5 of the 11 questions:

A. The PSE project team comprehensively deals with issues and seeks my input into resolving them.

B. The PSE project team allows enough time for my issues to be raised and addressed and for me to review and respond to information.

C. The PSE project team provides information within the agreed timelines and clearly articulates the deadlines for responses.

D. The PSE project team provides opportunities for me to ask questions and seek clarification

E. The PSE project team clearly explained their decision making process.

The most significant decline was in question E above. Showing a .34 or 8.2% drop.

Actions

The team discussed the results and is moving forward with the following actions in order to address low scoring questions.

- Track agency questions and concerns to ensure follow-up through one of our communication channels: email, newsletter, phone call, demos #2 and #3, quarterly managers meeting.
- Leverage the monthly newsletter to explain recent project decisions and explain how they were made.
- Avoid last minute meeting requests.
- Continue to include anonymous feedback options at demos #2 and #3 as well as at SME training.
- Follow-up on anonymous feedback via the newsletter or other appropriate communication channel.

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HELP Two-Year certification

- Update on discussions with HELP agencies and Commerce
- MSC’s Sample Processing Form
- Next steps - Further dialog with agencies and Documentation of the Procedure

AMI Opt-Out –Schedule 171

Schedule 171 AMI Opt

- PSE HELP recipients who choose to not have an AMI meter, can have their NCM Fees paid for by additional PSE HELP dollars.
- PSE to:
  - Determine additional PSE HELP amount
  - Communicate that to appropriate agency so Agency can update the HIF
  - Post pledge and payment so these customers can be tracked and reports drawn

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Schedule 171 AMI Opt

- Future Communications:
  - The mass notification mailers that are sent to each and every customer will have an updated footer informing customers that the NCM service is available. This will include the URL to the NCM portion of pse.com/meterupgrade and our back office phone number for more details.
  - There will be an NCM portion of our pse.com/meterupgrade that will go over the program and will include that income eligible customers may have fees/charges covered. This is expected to go live on June 1.

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Schedule 171 AMI Opt

- A brochure or factsheet will be available when the NCM service begins that will be available to agencies as well as other groups explaining the service.
- Customer Care to have one-on-one conversations with customers who indicated a preference to not have an AMI meter. These conversations will go over all the details of the program and they have talking points regarding income eligible customers potentially having the option to waive the associated fees/charges.

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Regulatory Update

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Regulatory update

- PSE Minority Ownership Transfer
- PSE Expedited Rate Filing
- Microsoft Settlement
- 2019 General Rate Case

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PSE Minority Ownership Transfer

- UTC approved PSE's minority ownership transfer to new investors in 2019, which included low-income commitments
- PSE shall contribute financial and staff resources to assist in conducting a low-income needs assessment study, which study is intended to provide better understanding of the needs related to energy affordability
- PSE agrees to use same funding components and methodologies for HELP
- Work with agencies and the State to incorporate equity in renewable energy programs
- Must consult with agencies on Get-to-Zero implementation

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Expedited Rate Filing (ERF)

- UTC approved a ERF settlement in 2019 that included increased funding for PSE's natural gas HELP program
- PSE will be required to increase the overall natural gas HELP funding available by 2.6% during its upcoming schedule 129 filing in October.

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Microsoft Special Contract Settlement

- Approved by UTC in 2017 setting a 20-year special contract for Microsoft
- Settlement included conditions to ensure PSE's low-income programs remain sufficiently funded
- Microsoft will make fixed payments of $0.000614 per delivered kWh into PSE existing HELP program over the contract term

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2019 General Rate Case

- PSE is planning to file a general rate case in the next few weeks
- PSE is planning to propose an increase to HELP funding that corresponds with proposed increases to customer rates

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HELP Income Guidelines

Jing Liu

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Clean Energy Bill

Clean Energy Bill – Low Income Provisions

Reporting

- Commerce must assess ways to prioritize funding towards low-income households with a higher energy burden.
- Every 2 years PSE must disclose to Commerce information about our low-income energy assistance programs
  - Snapshot of current programs
  - Outreach strategies to encourage more participation
  - Assessment of current funding level as compared to funding level needed to serve:
    - 60% of the current energy assistance need by 2030; and
    - 90% of the current energy assistance need by 2050.

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Clean Energy Bill – Vulnerable populations and Highly impacted communities

Ensure "all customers" benefit from the transition to clean energy through:

- Equitable distribution of energy and non-energy benefits; and
- Reduction of burdens to "vulnerable populations" (defined) and "highly impacted communities" (defined)

How?

- Informed by the cumulative impact analysis conducted by the Department of Health and
- Included as an assessment in the IRP
- UTC/Commerce Rulemaking may provide some guidance

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Agenda items for next meeting

Thank you!

Attachment G to PSE's Response to Public Counsel Data Request No. 185

Change in Launch Date!

- Launch initially planned for 9/15
- Attempted to move launch to August 24
  - UAT cycles exceeded plan and are still underway
  - Cycles for performance/regression testing are still ongoing to account for fixes
  - Additional scope was required for 2 year certification/AMI opt out
- Current plan is October 1
  - Includes 2 year certification/AMI opt out
  - Ensures all UAT testing is thorough and complete
  - Reduces the risk of last minute launch delay

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Upcoming Milestones

- ✓ July 9: Agency Demo #2
- ✓ July 11: Agency Demo #3
- ✓ July 29 through July 31: SME Training
- ✓ August 1 and August 5: Optional Train-the-Trainer
- August 6 through August 9: 2 year cert/Opt Out design
- August 12 – September 27: End User Training (onsite with agencies)
- September 30: Agency Set Up
- October 1: 2019/2020 Program Year Launch!
- Hypercare Support post-go-live - 4 Weeks

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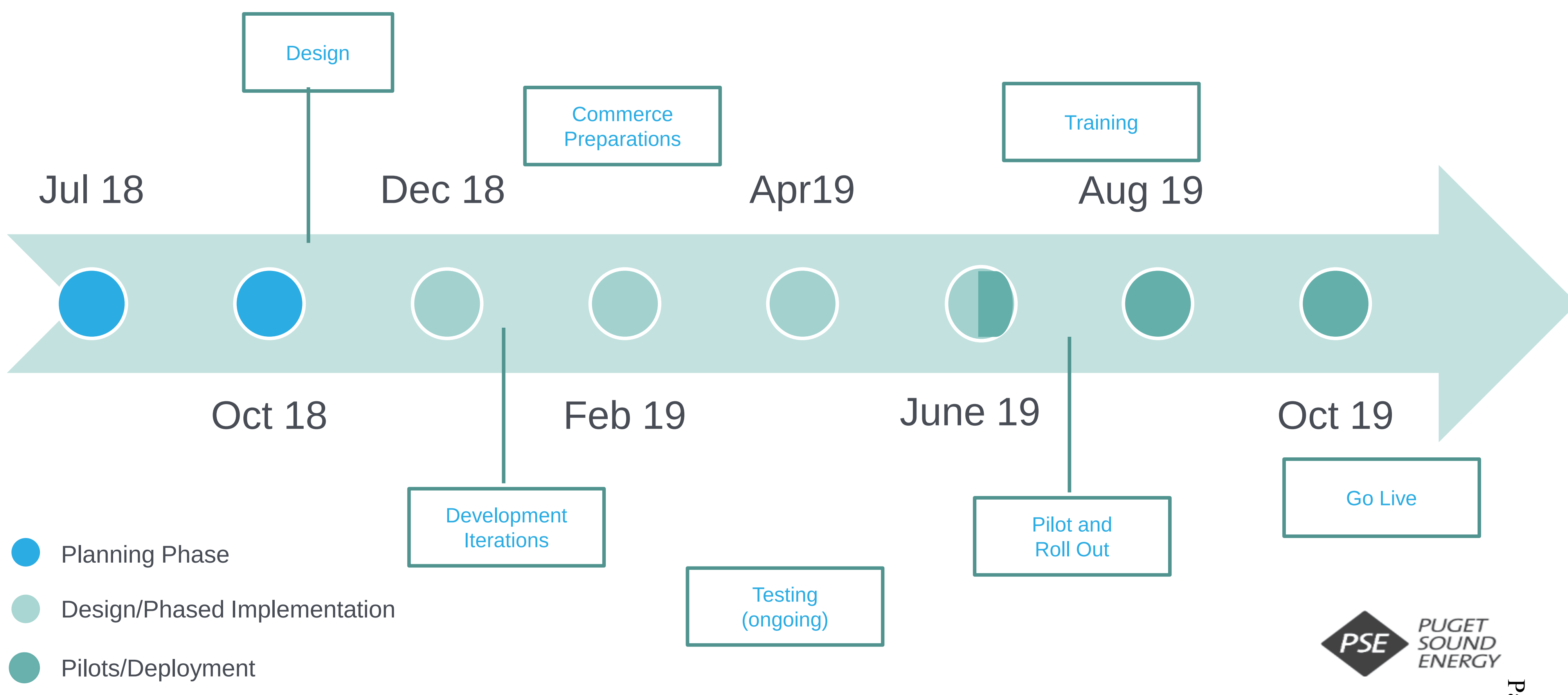
Attachment H to PSE's Response to Public Counsel Data Request No. 185

PROJECT TIMELINE (DRAFT)



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Attachment I to PSE's Response to Public Counsel Data Request No. 185

PSE Energy Assistance

Stakeholder Engagement Survey Analysis and Recommendations

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October 24, 2018

Presented by: Suzanne Sasville and Tricia Cawdrey

Safety moment

PUGET SOUND ENERGY

Topics

- Welcome!
- Safety moment
- Executive Summary
- Results, Analysis & Recommendations
- Summary of Recommendations
- Next Steps

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GtZ Energy Assistance Survey

Response Demographics and Approach

- **September 13 - 25, 2018**: Launched Survey Monkey survey to collect feedback from the PSE Energy Assistance Team, and the Energy Assistance Agency stakeholders
- 5-Star rating scale (1 = low rating; 5 = high rating)
- Survey designed to collect ***Stakeholder Engagement*** data to drive future communications and engagement

Role	Responded	Invited	Response Rate
Stakeholder Engagement Metric *PSE EA Team, EA Agencies, and Dept. of Commerce	18	33	54.5%
EA Agency Representation *Excludes Dept. of Commerce	10	25	40%

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Executive Summary

Above average response rate of
54.5%

Overall Themes

\+ Highest satisfaction is with ***Inclusiveness***

\+ Highest rating is with ***awareness*** and ***understanding*** of vision and objectives

\+ High satisfaction with PSE team's level of collaboration (seeking input, dealing and resolving issues)

\- Provide more ***advanced time*** for decisions, information, etc.

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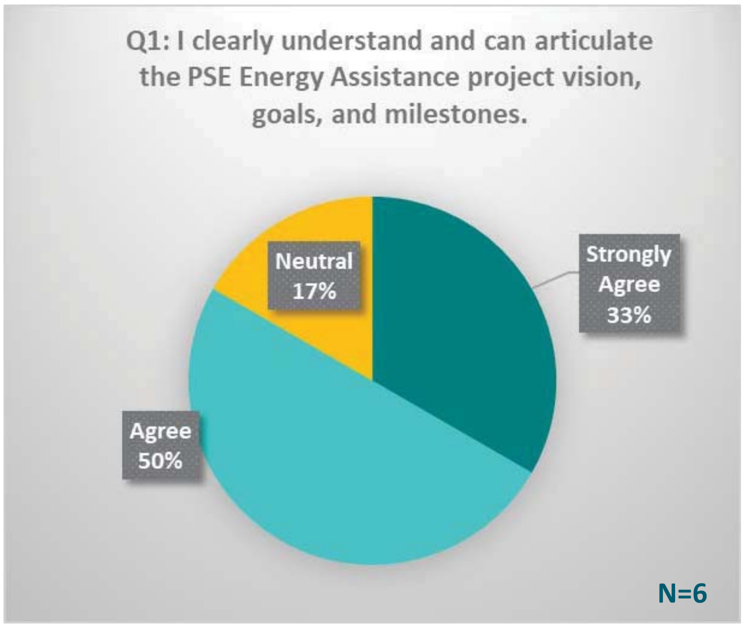
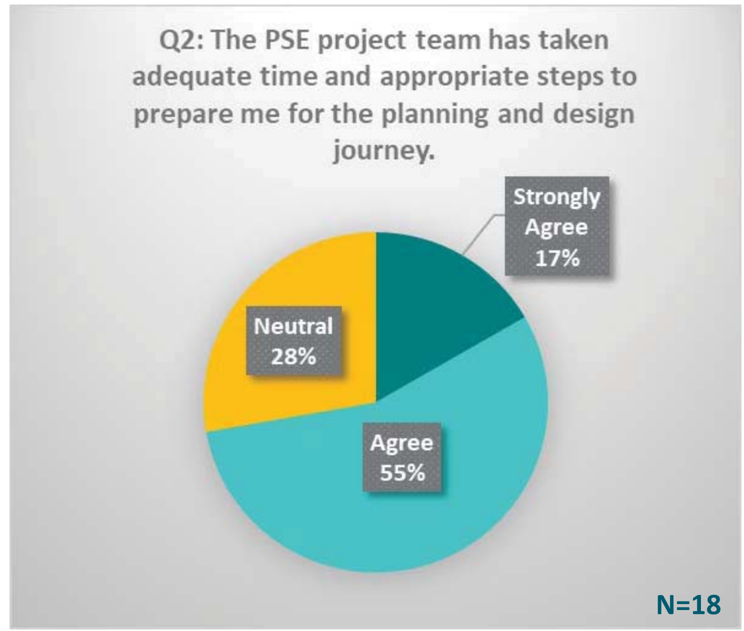
Stakeholder Engagement - Awareness





Recommendations to improve ***Awareness . . .***

- Provide a bi-weekly project update to all stakeholders which will include the project timeline, milestones, and accomplishments

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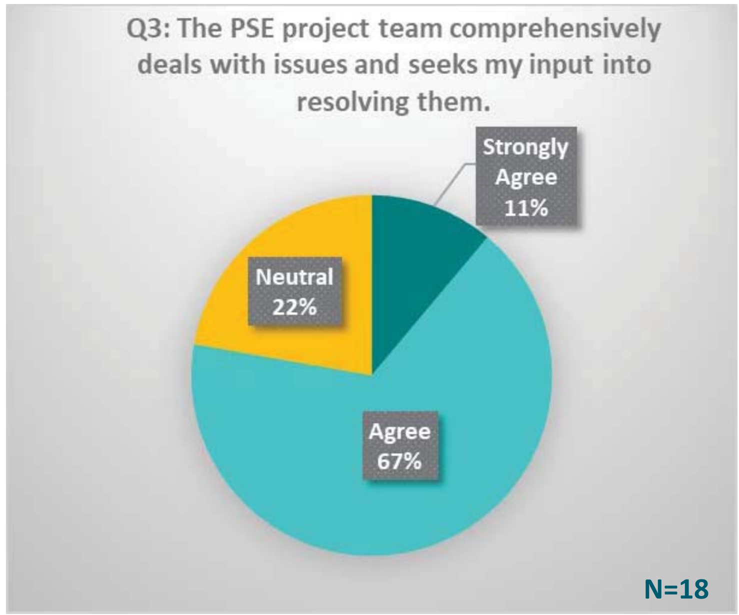
Stakeholder Engagement - Collaboration



Recommendations to improve ***Collaboration . . .***

- No recommendation– ***88%*** of respondents agree or strongly agree that the PSE Project Team is collaborative attaining input to resolve challenges

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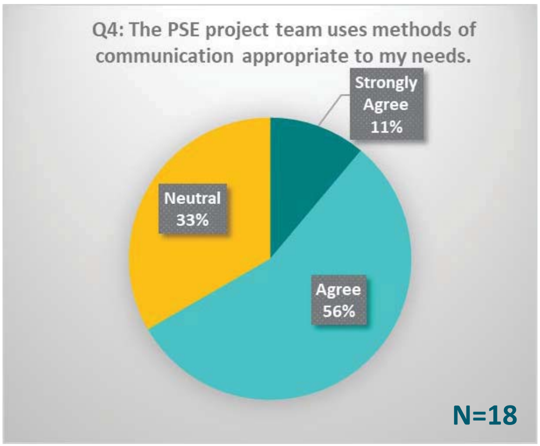
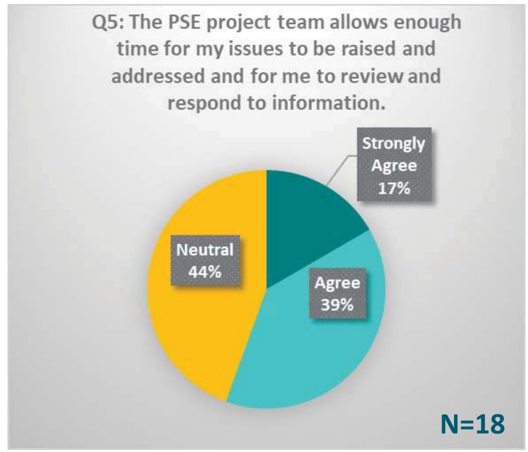
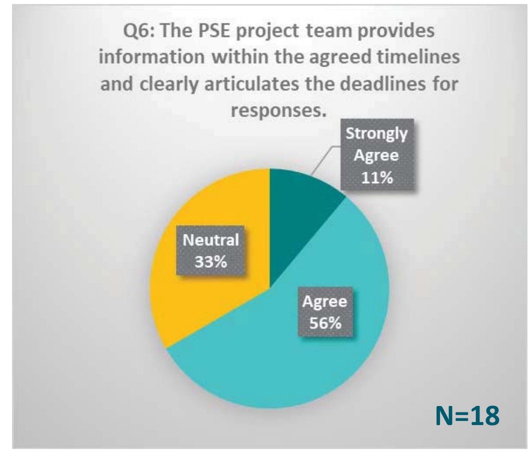
Stakeholder Engagement - Communication







Recommendations to improve ***Communication . . .***

- Provide a bi-weekly project update to all stakeholders which will include the project Vision, Mission, Goals, Milestones, and Accomplishments (included in Awareness pillar)

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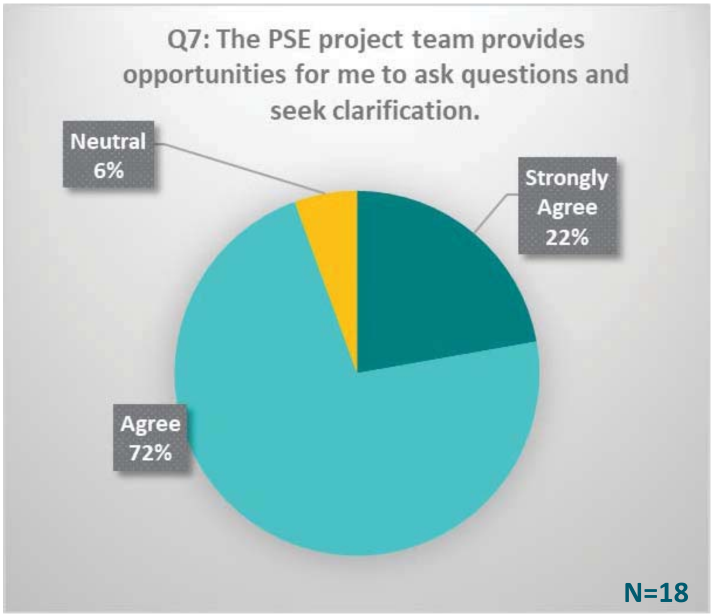
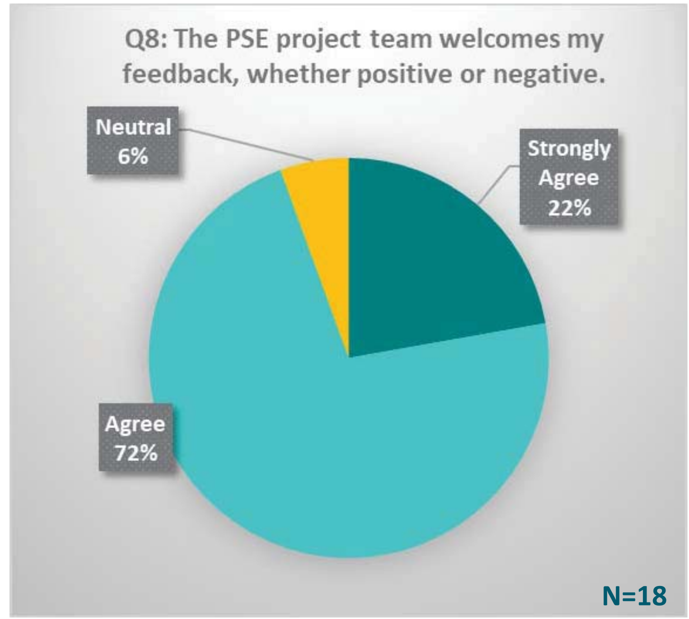
Stakeholder Engagement - Inclusiveness





Recommendations to improve ***Inclusiveness . . .***

- No recommendation– ***94%*** of respondents agree or strongly agree that the PSE Project Team is inclusive in seeking input and feedback

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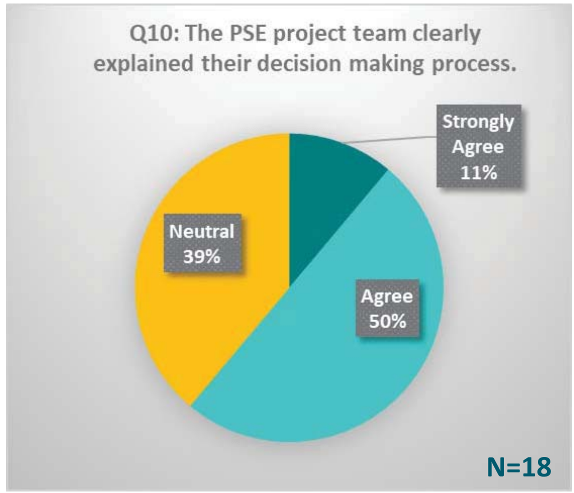
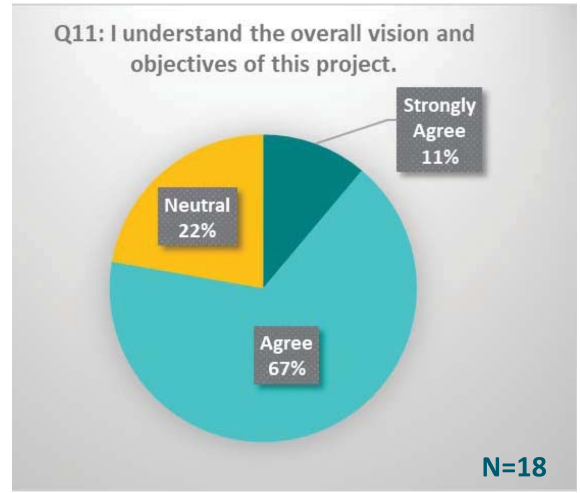
Stakeholder Engagement - Integrity and Transparency

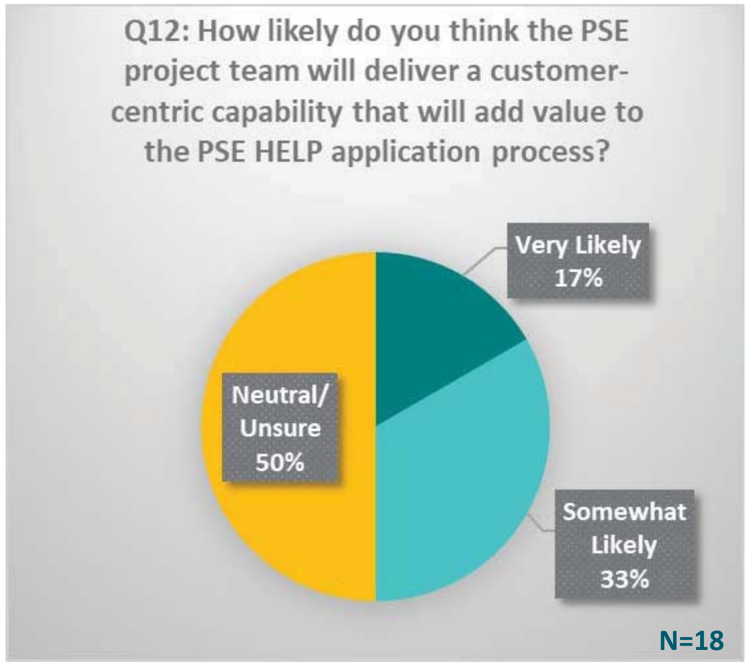




Recommendations to improve ***Integrity and Transparency . . .***

- PSE Project team has done a great job providing the OPPORTUNITY to ask questions and requests; however, trend is that we need to ***provide more lead time in advance of requests***

Stakeholder Engagement - Advocacy



Recommendations to improve ***Advocacy. . .***

- Continue to take the stakeholders on the journey by providing **detailed demos and "day-in-the-life"** view based on the results of the design sessions to build the awareness, desire, and insight into what the future capability

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Stakeholder Engagement - Feedback

Q13: Please provide your suggestions of how this core team can better engage, communicate and collaborate as we move forward along our journey

- We received one comment in the open feedback

"More Flexibility"

Recommendation to improve ***Open Feedback . . .***

- OCM lead to facilitate follow-on "pulse-checks" throughout the duration of the project (Target date: post-Demonstration in Dec/Jan)

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Stakeholder Engagement - Summary of Recommendations

PSE Low Income Team and Energy Assistance Agencies

Pillar	Recommendation
Awareness Communication	Provide a bi-weekly project update to all stakeholders which will include the project timeline, milestones, and accomplishments
Collaboration	No recommendation– **88%** of respondents agree or strongly agree that the PSE Project Team is collaborative attaining input to resolve challenges
Inclusiveness	No recommendation– **94%** of respondents agree or strongly agree that the PSE Project Team is inclusive in seeking input and feedback
Integrity & Transparency	PSE Project team has done a great job providing the OPPORTUNITY to ask questions and requests; however, trend is that we need to ***provide more lead time in advance of requests***
Advocacy	Continue to take the stakeholders on the journey by providing detailed demos and "day-in-the-life" view based on the results of the design sessions to build the awareness, desire, and insight into what the future capability
Feedback	OCM Lead to facilitate follow-on "pulse-checks" throughout the duration of the project (Target date: post-Demonstration in Dec/Jan)

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Next Steps

- Look forward to the PSE Project team providing you bi-weekly project updates on the project timeline, milestones, and accomplishments
- PSE Project team has done a great job providing the OPPORTUNITY to ask questions and requests; however, trend is that we need to ***provide more lead time in advance of requests***
- OCM Lead to facilitate follow-on “pulse-checks” throughout the duration of the project (Target date: post-Demonstration in Dec/Jan)

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Thank you

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