

**EXH. CLW-12
DOCKETS UE-22 ___/UG-22 ___
2022 PSE GENERAL RATE CASE
WITNESS: CAROL L. WALLACE**

**BEFORE THE
WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION**

**WASHINGTON UTILITIES AND
TRANSPORTATION COMMISSION,**

Complainant,

v.

PUGET SOUND ENERGY,

Respondent.

**Docket UE-22 ___
Docket UG-22 ___**

**ELEVENTH EXHIBIT (NONCONFIDENTIAL) TO THE
PREFILED DIRECT TESTIMONY OF**

CAROL L. WALLACE

ON BEHALF OF PUGET SOUND ENERGY

JANUARY 31, 2022

Interactive Bill Redesign
Seeking Initiation Funding
Corporate Spending Authorization (CSA)

Before starting: Contact the Capital Budget team (CSA-TeamMail@pse.com) for any clarification needed and review the [CSA Standard](#) when completing this template.

The sections provided expand / are not limited to one row. **Ensure you provide adequate information and back-up documentation to support your business case.** If a section or item is not applicable, enter N/A; if unknown, enter TBD. The gray fields are provided as prompts; do not leave these fields with instructions visible.

Date Submitted:	Click or tap to enter a date.
Officer Sponsor:	Andy Wappler
Project Director:	Carol Wallace
Responsible Cost Center:	4043

I. Project Overview

Update each section with high level information as applicable, noting any changes from the previous request/Gate.

Business Need: Today customers have some complications understanding details of their bill, how to update their due date, and they want simple solutions to understand the charges and credits. In addition, customers are looking for enhanced self-serve options to interact with the bill instead of a flat PDF with minimal options.

Interactive and Responsive Online Bill:

Today customers are able to view a static bill PDF plus some basic details available through the Web and Mobile Application. PSE wants to improve the customer experience by providing an interactive bill through the following channels: Web, Mobile Application, and V-IVR.

Additionally, PSE needs to investigate if an email delivered electronic bill (link potentially) with interactive options is desirable to customers.

Change Due Date:

PSE still has customers meter read on routes within SAP, which was necessary when PSE used to manually read or receive data based on meter read routes and billing cycles. Currently when a customer requests to change their due date the process only delays when the bill is sent to the customer and provides an extension of the due date based on the customers requested due date. This increases customers confusion as the read date does not align closely to the billing print date, and thus customers believe in certain cases they have a high bill. The current process creates unbilled revenue, as the meter reads and the associated charges follow the original bill cycle associated with the address. Once the customer requested due date arrives the account bills the reads and charges. These charges are then moved from unbilled revenue to billed revenue.

Proposed Solution: The solutions being proposed are based on research and information gained from 2018 and 2019. While designing the solutions new technology may provide additional options which better meet PSE customers' needs.

Interactive and Responsive Online Bill:

PSE will implement an interactive bill for the following channels - Web, Mobile Application, and Visual IVR which:

- Allows a customer a pay button directly from their bill
- Experience help bubbles where information pops up explaining charges or sections of the bill
- Other items as rationalized through options from customers and agents during research and evaluation
- Update graphical representation to reflect the month and not carry the incorrect month onto the graph
- Optimize the graph and information for bi-monthly customers to decrease confusion

Change Due Date:

In order to accommodate customer requested changes in PSE processes regarding due dates:

- PSE needs to evaluate if Read Routes are necessary and if Bill Cycles are needed to support other PSE processes.
- Align due dates so customers are able to select actual due dates instead of a range of due dates.
- Update self-serve options to provide this option through web, mobile application, and visual IVR.

Paper and PDF Bill updates to be made based on decisions made during this project based on Customer and Agent Feedback.

Project Outcome/Results:

Once implemented customers will be able to seamlessly understand and pay their bill directly from their interactive bill.

Customers will also be able to update their due date which will remove the delay in charges, align usage to the graphical representation on the bill which will reduce confusion and questions from customers.

This project would also provide customers these experiences where customers choose to engage, through the web, mobile application, and visual IVR.

OCM, Process & Training Impact:

N/A Low Impact Medium Impact Significant Impact

Customers will have a better experience interacting with their bills to understand the charges, details and clearly defined information on Paper, PDF and self-serve options.

Agents will need to understand these changes to support questions from customers to support self-serve questions, updates to the bill and QRM as well as how to read a bill in basic agent training.

Primary ISP Alignment:

Customer [ISP strategy descriptions](#)

ISP Strategy Description:

Customer - Execute the Customer Experience Intent Statement

Portfolio Description:

Strategic [Capital Allocation Definitions](#)

Project Complexity:
 Straightforward and well understood
 Complex and well understood
 Complex and not well articulated

II. Key Schedule and Financial Information

Expected Start Date If Funded:	01/02/2024
Expected In-Service Date:	12/7/2024

High-Level Schedule *Enter Expected # of Years and Months*

Duration				
Planning	Design	Execution	Total Project	Anticipated Closeout date
4 Months	4 Months	4 Months	1 Year	01/2025

Initial Estimated Funding % by Phase as of : *Enter values to include both O&M and Capital in the cells below for percentage of funding to be used in each phase of the project.*

Note: BTS's conceptual estimates are not estimated by phase, therefore we do not have the data that enables phase breakdowns. If desired, percentages could be: 0% for Initiation, 25% for Planning, 30% for Design, 40% for Execution, and 5% for Closeout.

Initiation	Planning	Design	Execution	Closeout
0%	%	%	%	%

Initial Grand Total Estimate (contingency included and in \$000s): Contingency Standard	Capital: \$5,844,838	OMRC/Project O&M: \$501,075 (Not including O&M Tail)
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Estimated Five Year Allocation: *Enter values in the cells below for years anticipated, up to five years, plus any expected future years. Change "Year 1, Year 2, etc. to the relevant years for this project. Ongoing O&M begins after project close-out.*

Category:	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Capital (contingency included)	\$5,844,838	\$	\$	\$	\$	\$
OMRC / Project O&M	\$501,075	\$	\$	\$	\$	\$

III. Ongoing Benefits

Summary Benefits (Worksheet is not required / optional for Initiation CSA):	While we do not think there will be significant call savings, a cursory review shows some call savings as we clarify and clearly represent billing details.
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Category:	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Ongoing O&M (to be funded by business)	\$	\$	\$	\$	\$	\$

Ongoing O&M (requesting \$'s)	\$	\$312,500	\$312,500	\$312,500	\$312,500	\$1,250,000
Benefits	\$	\$	\$	\$	\$	\$
Net impact (= Benefits – O&M)	\$	\$	\$	\$	\$	\$
* Payback in Years	Years = Total Costs / Annual Cash Benefits					

* Enter positive amount or Not Applicable

IV. Risk Management Summary

Identify high level risk categories expected for the project. Consider Project Dependency, Project Timing and Resourcing, as well as Regulatory Risk.

Summary of high level risks sentence:	Resource risk as if PSE selects a software we are unfamiliar with we may have ramp time to integrate with or learn the new software. Changing the read route for change your due date may have impacts on the Metering team. We have not yet considered how billing reads are managed today through billing cycles.
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V. Phase Gate Change Summary

Use this section for changes from: **Planning to Design, Design to Execution or Execution to Closeout** phases. To have a history of the changes at each phase gate change, **copy/paste the table below above the previous table.**

Phase:	Initiating to Planning
Scope:	N/A
Budget:	N/A
Schedule:	N/A
Benefits:	N/A

Prepared by:	Kristina McClenahan
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VI. CSA Approvals

Add/remove rows as needed in the table below. Email approval is acceptable. To maintain a history of the changes at each phase gate change, **copy/paste the table below above the previous table.** Send to the Capital Budget team at CSA-TeamMail@pse.com. For a project in the Strategic Project Portfolio (SPP) review the [Escalation Criteria](#) for appropriate escalation and approvals.

For guidance on approval authority levels, follow [CTM-07 Invoice Payment Approval Exhibit I Invoice/Payment Approval Chart](#)

Project Phase	Initiation Funding			
Approved By	Title	Role	Date	Signature
Carol Wallace	Dir Customer Solutions	Director Sponsor		
Greg Zeller	Dir Customer Care	Director	4/25/2020	Approval email
Andy Wappler	VP Customer Ops & Communications	VP		
Brian Fellon	Dir IT Application Services	IT Executive	4/23/2020	Approval email
Margaret Hopkins	Sr VP & Chief Information Office	VP		

*Director Sponsor attests that all considered documentation has been approved.

Please direct any questions to either:

1. The Capital Budget team at CSA-TeamMail@pse.com, or
2. The Enterprise Project and Performance Project Practices team at EPP-ProjectPracticesTeam@pse.com