

# PPL Electric Utilities Supplier Call September 26, 2016

# Agenda

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- Monday, September 26, 2016 at 2:00 p.m. EST
  - Conference Line: 888-238-2971 Passcode: 41691751

## Agenda:

- Seamless Move
- Instant Connect
- Q&A

# Seamless Move

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## Description:

- PPL was ordered to implement Seamless Move effective September 30, 2016 – This is to comply with the PUC order to allow a customer to keep their existing supplier when they move to a new address within PPL's territory.

## Process:

- The customer must call the PPL contact center and provide a disconnect date on the old account and connect date on the new account within the same phone call.
- If the customer passes the eligibility requirements for a seamless move, the contact center representative will inform the customer that they are eligible for a seamless move and will confirm they want to keep their supplier at their new location.
- An 814 Move transaction will automatically be sent to the supplier notifying them of the seamless move.

# Seamless Move

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- All calls that come in before 5 pm EST will be processed that evening. The supplier, bill option, summary/interval usage preference, tax exemption% (rate ready only) and rate code (rate ready only) will be ported over to the new connecting account from the disconnecting account.
- The disconnecting account will process the same as it does today and an EDI drop will be sent to the supplier on the disconnecting account and a letter will be sent to the customer.
- There will be no letter sent to the customer for the seamless move on the new account.
- If the customer subsequently calls PPL to change the disconnect or connect date, their seamless move may become invalidated if the new dates do not meet the lead time, overlap or gap requirements.

# Seamless Move

## Eligibility Requirements:

1. The eligible rate classes are the same as the standard offer program (Residential and small commercial < 25kw).
2. There must be a three business day lead time before the new connect want date.
3. There must be no more than a three business day overlap of service between the disconnecting and connecting accounts.
4. There must be no more than a three business day gap of service between the disconnecting and connecting accounts.
5. If the seamless move becomes invalidated, our system will inform the associate so they can advise the customer, and an EDI drop transaction will be sent to the supplier on the connecting account. The customer will get a drop letter and there will be a contact added to the account.
6. If the change to the connect date does not invalidate the seamless move, then an EDI change transaction will be sent to the supplier to notify them of the change in start date.

# Seamless Move Examples

## Basic Seamless Move

### Move in date before Move Out date

Customer calls 9/8/16.  
Move Out date 9/16/16 Premise A.  
Move in date 9/13/16 Premise B.  
PPL move in and move out process is executed as a seamless move.  
Move out is created for 9/16/16.  
814 M is created and sent to the supplier to notify them of the move to Premise B.  
814 D sent to the Supplier for Premise A 9/16/16.  
Pending Move is created at Premise B. For 9/13/16  
Supplier information is transferred to Premise B.

## Basic Seamless Move

### Move Out date before Move In date

Customer calls 9/8/16.  
Move Out date 9/13/16 Premise A.  
Move in date 9/16/16 Premise B.  
PPL move in and move out process is executed as a seamless move.  
Move out is created for 9/13/16.  
814 M is created and sent to the supplier to notify them of the move to Premise B.  
814 D sent to the Supplier for Premise A for 9/13/16.  
Pending Move is created at Premise B for 9/16/16.  
Supplier information is transferred to Premise B.

## Move Out or Move In date change

Customer calls 9/8/16.  
Move Out date 9/13/16 Premise A.  
Move in date 9/16/16 Premise B.  
PPL move in and move out process is executed as a seamless move.  
Move out is created for 9/13/16.  
814 M is created and sent to the supplier to notify them of the move to Premise B.  
814 D sent to the Supplier for Premise A on 9/13/16  
Pending Move is created at Premise B for 9/16/16  
Supplier information is transferred to Premise B  
Customer calls on 9/9 and wants move out or move in date changed.  
814 C sent to the Supplier as long as the gap and overlap rules are still met  
If the customer change makes seamless move invalid, PPL sends an 814D to Supplier A on Premise B with the reason code of SMW (Seamless Move Withdrawn).

# Seamless Move Examples

<b>Seamless Move Not Eligible Lead Time Fail</b>
Customer calls 9/8/16.
Move in date 9/10/16 Premise B.
Lead Time less than 3 days.

<b>Seamless Move Not Eligible Overlap fail</b>
Customer calls 9/8/16.
Move Out date 9/19/16 Premise A.
Move in date 9/12/16 Premise B.
Customer overlap greater than 3 days.

<b>Seamless Move Not Eligible Gap fail</b>
Customer calls 9/8/16.
Move Out date 9/12/16 Premise A.
Move in date 9/19/16 Premise B.
Customer gap greater than 3 days.

# Instant Connect

## Description:

PPL was ordered to implement “Instant Connect” effective September 30, 2016 - This is to comply with the PUC order to allow a new PPL customer to select (shop) for a supplier to start on "day one" (meter connect date) without first having to go on default service with PPL.

## Process:

- INSTANT CONNECT (IC) - A new Customer calls and indicates they do not want the standard offer but would like to shop. Customer will receive service from their chosen supplier from their first day of active service providing:
- Connect date is at least 3 business days in the future.
- Enrollment is received at least 3 business days PRIOR to the completion of the requested connect.
- The customer must have a valid PPL account number to provide to the intended Supplier so the Supplier can send in the enrollment.



# Instant Connect

## Eligibility Requirements:

### Eligible:

- Instant connect will be offered only to metered Residential and Small C&I customers (less than 25 kW).
- If the customer qualifies for Instant Connect, and shops with many suppliers, as long as the In Time Enrollment criteria is met, the **Last Supplier In Rule** applies and will follow existing process to interrogate the contract effective date.

### Ineligible:

- Instant connect is **not** available when the connect date has already occurred.
- Landlord accounts are not applicable. The tenant would be eligible to shop on day one if they chose to shop and they meet other qualifying criteria.
- New construction or a service that does not yet have a meter.

# Instant Connect

## Enrollments:

- As long as enrollment is received at least 3 business days PRIOR to the completion of the requested connect, customer will start day one of active service with that chosen supplier.
- NOTE: The cutoff time for recognizing that an enrollment was received is still 1300 EST(1:00 PM)
- If customer calls to change their connect wanted date and this new date invalidates their instant connect due to the 3 business day rule, the Supplier enrollment will be rejected and the customer will receive default POLR supply on day one of active service. An EDI drop will be sent to notify the supplier that they will not serve the account.
- Enrollment Letter (unchanged) is sent to customer once the connect activates.

# Instant Connect Move Examples

## Basic Instant Connect Supplier send 814E before Move In date

Customer calls 9/8/16 to initiate serve at new location.  
 Move in date 9/19/16.  
 PPL move in as a normal process and supply is set to default service.  
 Supplier sends 814E received on 9/12/16.  
 Existing default service is replaced with the Supplier.  
 814 E Response is sent to the Supplier with an effective date of 9/19/16.  
 PPL enrollment letter is sent to the customer 9/20/16.

## Basic Instant Connect Customer Calls to cancel Move in before Move in date

Customer calls 9/8/16 to initiate serve at new location.  
 Move in date 9/19/16.  
 PPL move in as a normal process and supply is set to default service.  
 Supplier sends 814E received on 9/12/16.  
 Existing default service is replaced with the Supplier.  
 814 E Response is sent to the Supplier with an effective date of 9/19/16.  
 On 9/10 the customer calls to cancel the move in.  
 814 D is sent to the supplier  
 No PPL enrollment letter is sent to the customer.

## Different Supplier sends in 814E before the move in date

Customer calls 9/8/16 to initiate serve at new location.  
 Move in date 9/19/16.  
 PPL move in as a normal process and supply is set to default service.  
 Supplier sends 814E received on 9/9/16.  
 Existing default service is replaced with the Supplier.  
 814 E Response is sent to the Supplier A with an effective date of 9/19/16.  
 814 E received from a different Supplier on 9/12/16 with a more recent contract effective date.  
 Supplier B overwrites Supplier A.  
 814 E Response is sent to Supplier B with an effective date of 9/19/16.  
 814 D sent to Supplier A with drop reason NLI.  
 PPL enrollment letter is sent to the customer 9/20/16 with Supplier B.

# Instant Connect Move Examples

## Instant Connect Lead time fail

Customer calls 9/8/16 to initiate serve at new location.

Move in date 9/19/16.

PPL move in as a normal process and supply is set to default service.

Supplier sends 814E received on 9/16/16.

814 E Response rejection. Account not active.

# EDI Changes

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- 814M – A new transaction that is generated from the EDC and sent to the Supplier when a seamless move takes place.
- 814D – Reason code SMW (Seamless Move Withdrawn)

# FAQs

- 1. Will drops be sent on the old account numbers always?**

Yes, a drop will occur on Premise A for a seamless move when the disconnect order is processed. If Premise B was also shopping, a drop will be sent for Premise B.
- 2. Will the old account number be used?**

No. New account numbers are generated for the move to Premise B. The 814M will have the old account number and the new account number.
- 3. When is the 814M transaction generated and sent to the Supplier?**

The 814M is sent to the Supplier the day of the customer call during batch processing overnight.
- 4. Can an 814C process on Premise A?**

Yes, as long as it is prior to Premise A becoming final.
- 5. Can an 814C process on Premise B?**

The 814C will be rejected on Premise B until Premise B becomes active. Once Premise B is active, the 814C will process.
- 6. Can a Supplier service the customer at 2 locations simultaneously?**

Yes, but only for three business days.
- 7. When can an enrollment be sent for an instant connect?**

An enrollment will be accepted as an instant connect as long as it is received at least three business days prior to the connect date.