

# Standard Offer Conference Call

1/10/2014

888-238-2971

Call ID: 2203616

# Enrollment Timeline

- EGS Obligations: Initiate EDI Enrollment transaction no later than 3 business days after the Referral.
- EGS Control: Suggest EGSs develop internal controls to ensure EDI Enrollments have been sent. Compare against Referral Report.
- EDC Control: PPL has developed a missing EDI Enrollment control. However, when the incorrect rate code/bill option is used, the Control Report is inaccurate.

# EDI Enrollment Transactions

- EGS Obligation: EGS must enroll the referred customers using the Rate Ready Bill Option.
- EGS Obligation: EGS must enroll using the correct rate code for the Referred date, regardless of when the Enrollment is sent. The appropriate rate code is on the Referral Report.
  - For example; Referral date is November 30<sup>th</sup> and the Enrollment is not sent until December 1<sup>st</sup>, the rate code in affect in November is required. (SOR4Q3)

# Enrollment Errors

- EGSs cannot use a non-standard offer rate code.
- When a non-standard offer rate code is sent, the Enrollment will be rejected on a not-yet-active buffered account.
- If an enrollment is sent using an improper rate code or bill option, PPL's control reports are not current, and an 814 Change transaction must be processed by the EGS.

# How to Identify Voids

- When Standard Offer Referrals are posted to the Supplier Portal Referral Report, customers are not always “active”. They may be “pending active” and have requirements before they can go active. For example, they may be required to provide a security deposit. If customers do not fulfill their requirements, the connect which would move the account to the “active” status is voided.

# Voids

- In the cases where an enrollment request was already sent in by the Standard Offer Supplier, PPL “buffers” or holds the enrollment request until the account is moved into the “active” status. When the connect does not occur and the void is completed, PPL will reject the buffered enrollment.

# Voids

- PPL created an enhancement to update the row in the standard offer referral report to show that the original customer account line item now has a status of “void”. Additionally, each evening during PPL’s batch processing, any voided Referrals are compared to our production billing system to attempt to locate a replacement customer account number for the original Referral. If a new account number is matched, a new Referral will be posted to the current Referral Report. You will identify this because you will have a post-dated Referral on your current Referral Report.

# Voids

- When you run your referral reports, you may see an account that has a solicitation date from 2 weeks ago with a void status. We will also show you a replacement account, if one is found. We have attached an example of what you might see if you ran the referral report for yesterday 11/25/13 and an account that was referred awhile ago was voided yesterday.



# Invoicing

- PPL bills the EGS based on Referrals, not Enrollments.
- EGSs are responsible for tracking and reporting on the Program independently.

# Customer Issues

- PPL still has customer confusion regarding the SOP Program. This results in PPL's Customer Service Department occasionally to remove the Standard Offer EGS.
- PPL is undertaking re-training efforts.
- When PPL is made aware of this situation on an account, the EGS will either be credited on their next invoice, or not billed at all based on timing.

# Frequently Asked Questions

- After the 12-month bill period, can the EGS change their rate ready bill method to bill ready?
  - Yes. Communicate to PPL via 814 EDI Change transaction.
- After the 12 billing period minimum, can the EGS change the rate ready rate code to a different rate code?
  - Yes. Communicate to PPL via 814 EDI Change transaction.

# Frequently Asked Questions

- What happens when customers already enrolled with the EGS come in via the SOP process? If there are unique scenarios, how must EGS handle each scenario?
  - Yes. Communicate to PPL via 814 EDI Change transaction.
- What happens when SOP accounts are submitted for enrollment, but then rejected by PPL for 'Account Exists but Is Not Active.'?
  - This is because the EGS submitted the 814 Enrollment with a non-SOP rate code. Resend corrected 814 Enrollment.

# Frequently Asked Questions

- When accounts arrive on the 'Pending Enrollment' file, when do they move to the 'Standard Offer Referrals Enrollment' file? What is the logic for how accounts move from one to the other?
  - All accounts are on the Referral Report to begin with. Only pending active accounts are on the Standard Offer Pending Enrollment Report. The account will remain on this report until the account become active or is voided.

# Frequently Asked Questions

- Possible 814 Enrollment Rejection Reasons
  - Improper Rate Code on a pending active account
  - Not Last In
  - Voided account
  - Final account

# Frequently Asked Questions

- What time will the daily Referral file be available.
  - Referrals are populated throughout the day in real time.
- Does the file processing exclude the same holidays/non-processing days as PPL's Choice schedule?
  - The real-time cumulative Referral Report file is built as the agents take the customer calls and the customers agree to participate in the program. Our agents take calls and process referrals in real-time only during core business hours.

# Frequently Asked Questions

- Is the enrollment file overridden daily if not picked up?
  - No. The Referral Report is cumulative and is available 24 X 7 X 365 via the Supplier Portal. Suppliers have the ability to filter the report by date. When the Supplier logs in to retrieve their Referral Report, the date filter will default to today's date. However, any date range can be inserted and the records retrieved.



# Frequently Asked Questions

- Will PPL-E post the price to compare?
  - Date/time  
PTC will be available 10 business days before end of month/New Qtr. (A "preliminary price" will be available before that time, as an estimate only.)
- Is the referral fee (\$28) based on number of customers sent or enrollments accepted?
  - The referral fee is based on the number of customers populated on the Referral Report. (but if rejected, they will try to enroll a new customer)

# Frequently Asked Questions

- Is the Payment \$28 per customer OR "PPL Electric's actual costs per referred customer"?
  - \$ 28 for each customer populated on the Referral Report. If enrollment rejects/voids due to: non-payment of security deposit, customer resigned with another supplier, elected a new supplier in the Referral Program etc. PPL will try and find a new "good" enrollment for replacement.

# Frequently Asked Questions

- Are net metered customers included in this program?
  - Yes. Net metered customers are eligible to participate in the program.
- If new and moving customers are enrolled with PPL-E for the initial month of service, will their enrollment be accepted?
  - Yes. But they will show up on the Buffer Report # 2 - in pending active status. Once they become active, the Supplier will received an 814 Add Accept response.

# Frequently Asked Questions

- Can a reinstatement put the customer back in the Standard Offer Program?
  - No. EGS would need to send in another enrollment.
- Are the "Quarter Pricing" months pre-defined... (Example 1Q-2014 = Jan, Feb, Mar) or are they decided upon one calendar month prior to the start of the next quarterly period?
  - Yes. December 1 2013 – February 28, 2014. March 1, 2014 – May 31, 3014. The quarters are based on a PJM calendar year which begins June 1st of each year.

# Frequently Asked Questions

- If a Supplier Ops-Out of participating in either the Residential or Small C&I Referral Program, is a new Standard Offer Program Binding Participation Form and Standard Offer Contract Form required?
  - Yes. It must be resubmitted (received at least 5 calendar days prior to the start of the program quarter.

# Next Quarter Timeline

- March 1, 2014 – May 31, 2014
- February 18, 2014, March – May PTC announced.
- February 24, 2014 deadline for binding agreement or cancellation of next quarter's participation.

# Notification

- The Standard Offer EGS Participant need only execute and submit this Form to PPL Electric once. However, in order to be a participant during each PTC Quarter, it must utilize distinct Rate Codes for each PTC Quarter through the PPL Electric System and notify the Company via e-mail of its intent to participate per Article 4 of the SOP Rules. Any EGS failing to notify the Company of its intent to participate in the Program will be excluded from that quarter's SOP offering.

# Questions?