

2 Feedback from the last winter moratorium cycle

- Overall, feedback received from the group regarding last year's winter moratorium cycle was positive. There has been good communication amongst parties, which has been appreciated. Parties reiterated that they have operationalized these processes to be part of their normal course of business, and remain cognisant of vulnerable customer related issues.
- Alberta Human Services raised two issues for discussion with the group. Similar to last year, Alberta Human Services indicated that it is still taking a relatively long time to receive information back from retailers after sending consent for release of information forms signed by customers. The second issue is related to billing errors where non-regulated amounts are being added to a customer's regulated account. Alberta Human Services is working on resolving these issues on a case by case basis, but noted that it would be ideal if a resolution could be reached. AUC staff suggested that Alberta Human Services work with retailers offline to try and get such instances resolved. If it continues to experience issues, Alberta Human Services is advised to inform the AUC.
- UCA staff update:
 - For the 2014-2015 winter moratorium cycle, UCA staff were successful in reconnecting 129 customers to their natural gas and/or electricity services. Of these 129 customers, 108 were able to negotiate payment arrangements with their service providers, 7 resolved their billing disputes through the UCA's mediation efforts, and 14 were referred to a third party for payment assistance to get reconnected. In addition, 8 were referred to third party agencies such as Alberta Works, or Alberta Income for the Severely Handicapped (AISH), for further assistance; however the outcome for these 8 individuals remains unknown to UCA staff.
 - UCA staff revisited the topic of municipal permit requirements for gas customers who have been disconnected for six months or more. Although they did not see any reported cases of customers who were left needing a permit for gas reconnection, it remains a large obstacle for certain customers to overcome the requirement to pay for an inspection and permit (in addition to their arrears). Often times, those customers who have been disconnected from their natural gas for longer than six months are unaware that a site inspection and permit (for safety reasons) is required before they can be reconnected.
 - UCA staff also encountered a few cases where customers seeking financial assistance in order to be reconnected did not qualify for third party assistance from Alberta Works or AISH, as they were Aboriginal individuals living on reserve land. UCA staff mentioned that it would be nice to know what types of assistance was available in these types of situations, such as a federal program. AUC staff and UCA staff discussed working together to try and identify assistance programs that may be available.

ACTION: AUC staff and UCA staff to work together to try and identify assistance programs that may be available for customers seeking financial assistance in order to be reconnected, but do not qualify for third party assistance from Alberta Works or AISH.

- In reference to the customer information that UCA staff requests from retailers, UCA staff advised that some retailers had provided more information than what was asked for in the UCA's spreadsheet. For privacy purposes, UCA staff reminded retailers to only provide the customer information that is being asked for in the spreadsheet. In addition, UCA staff noted a number of instances where the customer phone number was not provided or was invalid (e.g. 111-111-1111). Retailers agreed to verify that the customer information being sent to UCA staff is accurate. Should UCA staff see instances of invalid phone numbers, it will contact the retailers directly to resolve the issue.
- While UCA staff mentioned that the spreadsheet would remain the same as last year, similar to last year's process, UCA staff will forward to regulatorypolicy@auc.ab.ca the Excel spreadsheet to be used by retailers when forwarding customer information to UCA staff. AUC staff will circulate this Excel spreadsheet to all retailers involved with the vulnerable customers initiative.

ACTION: UCA staff to forward to regulatorypolicy@auc.ab.ca the Excel spreadsheet to be used by retailers when forwarding customer information to UCA staff. AUC staff will circulate this Excel spreadsheet to all retailers involved with the vulnerable customers initiative.

- One retailer inquired about the number of repeat customers received by UCA staff, to which UCA staff advised that there were 180 repeat customers. UCA staff have implemented a new plan to determine the reasons why a customer may be a repeat or first time on the project. Based on information that was voluntarily provided by customers to UCA staff, repeat customers fell into one of the following four categories: Fixed Income, AISH, Senior or Pension. The main reasons for first time on the project customers included the following: Life Event, Prices Too High, Vulnerable/Receiving Financial Assistance, and English as a Second Language.
- As mentioned last year, UCA staff reminded retailers that commercial sites are not considered to be vulnerable consumers, therefore retailers should not be including commercial sites on their lists to UCA staff. One party mentioned that some residential accounts are under the name of a business, but at the site level they consider them residential, and therefore get included in the list provided. Based on group discussion, it was agreed that the UCA staffs' focus is on vulnerable residential consumers and that commercial sites should not be sent. UCA staff offered availability to look into any exceptional cases as they arise.
- During the September 9, 2014, Consultation on Disconnection and Reconnection Practices – Phase One meeting, UCA staff put forward an action to continue to contact customers owing less than \$25 and obtain reasons why customers remained disconnected despite owing a small amount, with UCA staff to provide the group numbers and reasons in the spring of 2015.
 - As there was no meeting held in the spring, UCA staff provided an update at this meeting. UCA staff had contacted just over 100 customers owing \$50 or less (rather than \$25 or less), and noted that out of the 100 customers contacted, most were owing around \$20.

- For those customers who have a zero balance but remain disconnected, distributors perform a site visit to investigate why the customer has not attempted to get their electricity or gas services reconnected. If someone is living at the site, the distributor will reconnect that customer. In order to increase efforts in ensuring that as many people are contacted and/or reconnected as possible before the cold weather begins, UCA staff is recommending that for those customers owing \$50 or less, the same site visit process apply and that the amount owed be transferred on to the next bill. This would prevent the vulnerable customer from being disconnected and having to pay a reconnection fee along with its arrears at a later date.
- UCA staff advised that such a change in the process would result in an additional 100 site visits for ATCO Gas. ATCO Gas staff noted that taking on an additional 100 sites may be manageable, however, it would need to confirm this internally.
- One retailer expressed concerns with this new potential process. There were some concerns with respect to changing the process so late in the year. Rather than making changes to this year's process, the group agreed to hold off until the spring to meet and discuss whether changes in the process are necessary. In the meantime, UCA staff agreed to continue contacting customers owing less than \$50 and obtain reasons, where possible, why customers remain disconnected despite owing such a small amount. UCA staff to provide the group with its findings in the spring.

ACTION: UCA staff to continue contacting customers owing less than \$50 and obtain reasons why customers remain disconnected despite owing such a small amount. UCA staff to provide the group with its findings in the spring.

3 Referral process – social service agencies to provide updated contact and process information

- Similar to last year, parties agreed to send updated contact information to regulatorypolicy@auc.ab.ca by Friday, September 25, 2015. AUC staff will then circulate an updated contact list to the working group.

ACTION: Parties to send updated contact information to regulatorypolicy@auc.ab.ca by Friday, September 25, 2015. AUC staff will then circulate an updated contact list to the working group.

- Going forward, any changes in contact information during the year are to be sent to regulatorypolicy@auc.ab.ca. AUC staff will then circulate these changes to the working group.

4 UCA process – group to discuss timelines and other changes to process for 2015/2016

- Timeline and process:
 - Retailers confirmed that they would begin running their lists of customers cut-off for nonpayment (CONP) since the last winter moratorium that remain disconnected and in arrears, during the last week of September to first week of October 2015.
 - Throughout the month of October, retailers will focus their efforts on contacting customers by letter and/or by phone.

- Since November 1, 2015, is a Sunday, the group decided that this year, retailers will submit their lists to UCA staff by Monday, November 2, 2015, using the Excel template provided by UCA staff. Those customers not in arrears will be passed on to the distributor for site visits.

ACTION: Retailers to provide to UCA staff by Monday, November 2, 2015, their lists of customers disconnected for nonpayment since the last winter moratorium that remain disconnected and in arrears.

5 Distributor site visit process

- The group agreed that the distributors' lists will be provided to them by Monday, November 2, 2015.

ACTION: All retailers to provide distributors by Monday, November 2, 2015, their lists of customers that remain disconnected for nonpayment and are not in arrears.

6 Other issues

- For last year's process, Direct Energy had included a paragraph on its website and in its letters to customers referring them to Alberta Works (should the vulnerable customer have any questions or require additional information). It was requested that the Alberta government social agencies verify the support services information that some providers were planning to include in their letters sent to customers as well as on their websites, so as to ensure that the language used is consistent. The group decided that this paragraph would be sent to the AUC for circulation, and parties could determine if it is appropriate for them to include the message in their correspondence to customers.
 - Human Services Communicated provided the following approved message which the AUC circulated to the working group on September 24, 2015: We understand these are challenging economic times for many Albertans. The Government of Alberta helps people meet their basic needs, find jobs and upgrade their skills to get better jobs. For more information, call 780-644-9992 (1-877-644-9992 toll-free outside Edmonton) or visit www.albertasupports.ca.
- Regarding UCA staff recommendations to Service Alberta, the group inquired about the scope of the proposed media releases, and whether or not they would be a public service announcement. UCA staff indicated that they are working on a communications plan to highlight the number of customers UCA staff have serviced through the Disconnection and Reconnection project.
- The consensus was that a media release is considered a positive thing in order to reach out to more vulnerable customers. UCA staff expressed that many consumers are unaware of the UCA's role, the disconnection program and the alternative assistance channels available to them. It plans to have a media release issued by mid-October of this year. UCA staff advised that it would distribute a final copy of its media release to regulatorypolicy@auc.ab.ca for circulation to the working group.

ACTION: UCA staff to distribute a final copy of its media release to regulatorypolicy@auc.ab.ca for circulation to the working group.

- AUC staff thanked all parties for their participation and continued hard work on this initiative. AUC staff advised that the next working group meeting will be scheduled for the spring 2016.