
March 16, 2001

ADVICE 1525-E
(U 338-E)

PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA
ENERGY DIVISION

SUBJECT: **Modification of Customer Application Forms for California
Alternate Rates for Energy Program**

In compliance with Decision 00-09-036 (D.00-09-036), issued on September 7, 2000, Southern California Edison Company (SCE) hereby submits its Form 14-338, Application for California Alternate Rates for Energy (CARE), for revisions.

PURPOSE

This advice filing revises the associated customer application to SCE's Schedule D-CARE, Form 14-338, to reflect a number of changes in the types and categories of information requested from customers applying for the CARE program.

BACKGROUND

In Ordering Paragraph 6 of D.00-09-036, the California Public Utilities Commission (Commission) directed Pacific Gas and Electric Company, Southern California Gas Company, SCE, and San Diego Gas & Electric Company (collectively, the Utilities) to develop CARE application forms that request the same types and categories of information from all customers applying for the CARE program. The Utilities were directed to jointly develop such forms with public input and file them in an advice letter filing by March 1, 2001. On February 28, 2001, the filing date was extended to March 16, 2001, by the Commission's Executive Director.

The Utilities held two public input forums to provide interested parties a venue to comment and offer suggestions about the data requested on their respective CARE applications. The first public input meeting was held on February 13, 2001, in Downey, and the second on February 14, 2001, in San Francisco. These meetings were scheduled to facilitate attendance by locating one meeting in southern

California and the other in northern California. Toll-free call-in numbers were provided for interested parties who were unable to travel to the meeting sites. The list of participants is provided in Attachment A, attached hereto.

The Utilities' respective CARE applications, while different in format, have generally asked the same information of applicants. Differences in application formats occurred due to differing business constraints of each utility and the fact that the Utilities have not been asked to achieve more uniformity in their application forms in the past. For example, two of the utilities are required to enclose a CARE application in the billing envelope annually. This requirement constrains the size and format of the application.

PUBLIC INPUT PROCESS

At the two public input meetings, public attendees, Commission representatives, and utility representatives offered a variety of suggestions aimed at improving the CARE application forms. Some comments and suggestions were diametrically opposed to others. In some cases, substantial discussion helped parties reach a consensus on issues. For some issues, however, it was not possible to reach resolution at this time and/or the issue did not concern the types and categories of information on the application forms. Attachment B contains a short description of all public comments and subsequent discussions from the two public input meetings. This attachment also lists items that the Utilities were able to incorporate into their CARE applications at this time, as well as those suggestions that will be kept for analysis and possible implementation in the future.

CONSENSUS ISSUES

In considering the public input and comments, the Utilities determined that the following changes are appropriate for immediate standardization on their respective CARE applications:

- **Personal Information:** Each utility's CARE application form will request the following customer information:¹
 - Customer Name
 - Service address
 - Utility Account Number

¹ When utilities are capable of providing a pre-printed (computer-generated) application, the Customer Name, Service Address, and Account Number are already provided on the CARE application. Because not every utility has these capabilities and it would be extremely expensive to add this functionality, the Utilities agreed that this capability should not be standardized, especially given that it does not affect the types and categories of information required on the form.

- Telephone Number (with the option of requesting “home” and “work” numbers)
 - Total annual household income
 - Number of persons in household, broken down by the categories of “Adults,” “Children,” and “Total.”
- **Types and Sources of Income:** A list of the types and sources of income that applicants can use to calculate their annual income to determine their eligibility for CARE will be included on each utility’s CARE application in the following order and format:
 - Wages or Salaries
 - Interest or Dividends from:
 - Savings Accounts,
 - Stocks or Bonds, or
 - Retirement Accounts
 - Unemployment Benefits
 - Rental or Royalty Income
 - Scholarships, Grants, or Other Aid Used for Living Expenses
 - Profit from Self-Employment (IRS Form 1040, Schedule C, line 29)
 - Disability Payments
 - Workers Compensation
 - Social Security, SSI, SSP
 - Pensions
 - Insurance Settlements
 - Legal Settlements
 - TANF (AFDC)
 - Food Stamps
 - Child Support
 - Cash
 - Other Income
 - Spousal Support
- **Income Qualifications:** Each utility will list the income qualifications per household size in a table with the following format:²

MAXIMUM HOUSEHOLD INCOME	
Number of Persons in Household	Total Combined Annual Income
1 or 2	\$XX,XXX
3	\$XX,XXX
4	\$XX,XXX
5	\$XX,XXX
Add \$X,XXX for each additional person.	

² Pursuant to Resolution E-3524, the CARE income qualification guidelines are updated annually. The new income guidelines for 2001 have not yet been received by the utilities from the Commission’s Energy Division. The Utilities’ propose to insert those figures into the standardized Maximum Household Income table once they are available.

- Declaration and Self-Certification Statement: Each utility's CARE application form will contain a customer declaration and self-certification statement of eligibility and signature block that will be printed in the following manner:

"I state that the information I have provided in this application is true and correct. I agree to provide proof of income, if asked. I agree to inform [name of utility] if I no longer qualify to receive the discount. I understand that if I receive the discount without meeting the qualifications for it, I may be required to pay back the discount I received. I understand that [name of utility] can share my information with other utilities or their agents to enroll me in their assistance programs."

Customer Signature

Date

- Other Assistance Information: Each utility's CARE application will include a section regarding other low-income assistance program information that will read as follows:

"OTHER PROGRAMS AND SERVICES YOU MAY QUALIFY FOR:

LIHEAP – Low Income Home Energy Assistance Program. Provides bill payment assistance, emergency bill assistance and weatherization services. Call the Department of Community Services and Development at 1-800-433-4327 for more information."

Each utility will have the discretion to list other utility services for which customers may be eligible below this statement. This flexibility allows each utility to list the appropriate services available to its customers.

SPECIFIC MODIFICATIONS TO SCE'S CARE APPLICATION FORM

SCE proposes to make a number of specific changes to its CARE application, Form 14-338, in order to conform to the consensus issues discussed above. Specifically, SCE's proposed changes, as reflected in Attachment C attached hereto, are as follows:

- Income Qualifications: SCE's former household income table differed slightly in the title and column headings from the standardized format of the Maximum Household Income table. SCE's proposed Attachment C reflects these changes.
- Types and Sources of Income: The order of the possible sources of income as well as the description of some sources of income was modified slightly in order to comply with the standardized format. Attachment C reflects these changes.
- Customer Information Section: In order to conform to the standardized categories of information requested on the form, SCE proposes to modify its old form to include a break-down between "adults" and "children" in the "total number of persons in the household" box. Also, to make the form easier to fill understand, SCE changed "Edison Account No." to "Edison Service Account No." These changes are reflected in Attachment C.
- Declaration and Self-Certification Statement: The wording of this section is modified to reflect the agreed-upon standardized language that each utility will now use. Attachment C reflects these changes.
- Other Assistance Information: In order to conform with the standardization of applications, SCE's proposed Attachment C is revised to add this section which was not included on SCE's previous form.
- Other Miscellaneous Changes: In addition to the standardized changes, SCE made several minor word edits in order to make the application easier for customers to understand and complete. SCE also updated some of the dates for 2001. Additionally, some graphics, such as a pair of scissors and a hand with a pen, were added to achieve greater clarity in how to complete and return the form. Lastly, SCE included a "Resource Code" space on the reverse side of the form in the event SCE decides in the future to start tracking various outreach methods. SCE does not believe these minor changes are substantive in nature, nor do they affect the types and categories of information requested on the forms. All of these changes are reflected in Attachment C.

No cost information is required for this advice filing.

This advice filing will not increase any rate or charge, cause the withdrawal of service, or conflict with any other schedule or rule.

EFFECTIVE DATE

This advice filing is made in compliance with Commission directives in D.00-09-036. SCE respectfully requests that this filing be approved and become effective on April 1, 2001, or as soon thereafter as possible in order to allow the Utilities to successfully implement changes to their respective CARE application forms by the proposed June 1 implementation date. To meet this expedited schedule, SCE respectfully requests that the Commission expedite its review of this filing and shorten the protest period from twenty (20) days to ten (10) days pursuant to General Order 96-A.

NOTICE

Anyone wishing to protest this advice filing may do so by letter which must be received by SCE no later than 10 days after the date of this advice filing, provided SCE's request for expedited treatment is granted. Protests should be mailed to:

IMC Program Manager
Energy Division
California Public Utilities Commission
505 Van Ness Avenue, Room 4002
San Francisco, California 94102
Facsimile: (415) 703-2200
E-mail: jjr@cpuc.ca.gov

Copies should also be sent to the attention of the Director, Energy Division, Room 4004 (same address above).

In addition, protests and all other correspondence regarding this advice letter should also be sent by letter and transmitted via facsimile to the attention of:

Donald A. Fellows
Manager of Revenue and Tariffs
Southern California Edison Company
2244 Walnut Grove Avenue, Rm. 303
Rosemead, California 91770
Facsimile: (626) 302-4829
E-mail: lawlerem@sce.com

Bruce Foster
Vice President of Regulatory Operations
Southern California Edison Company
601 Van Ness Avenue, Suite 2040
San Francisco, California 94102
Facsimile: (415) 673-1116
E-mail: fosterbc@sce.com

There are no restrictions on who may file a protest, but the protest shall set forth specifically the grounds upon which it is based and shall be submitted expeditiously.

In accordance with Section III, Paragraph G, of General Order No. 96-A, SCE is mailing copies of this advice filing to the interested parties shown on the attached service list and all interested parties in R.98-07-037. Address change requests to the attached GO 96-A service list should be directed to Emelyn Lawler at (626) 302-3985 (e-mail: lawlerem@sce.com).

Further, in accordance with Public Utilities Code Section 491, notice to the public is hereby given by filing and keeping the advice filing open for public inspection at SCE's corporate headquarters.

For questions, please contact Jennifer Hasbrouck at (626) 302-1040 (Jennifer.Hasbrouck@sce.com).

Southern California Edison Company

Donald A. Fellows, Jr.

DAF:jrh/eml
Enclosures

Attachment A

CARE Public Workshop Attendee Lists

February 13, 2000 (Energy Resource Center, Downey)

Facilitated by Donna Jones-Moore, Southern California Gas Company

	Name	Organization/Company
1	Elizabeth Kyuchokyam	Armenian Relief Society
2	Patricia Torres	Community Rehabilitation Services
3	Sandy Jernegan	Community Pantry
4	Sharon Lee-Balderas	Southern California Gas Company
5	Susanna Selesky	Southern California Gas Company
6	Carmen Rudshagen	Southern California Gas Company
7	Pete Zanzot	Southern California Edison Company
8	Jack Parkhill	Southern California Edison Company
9	Pat Aldridge	Southern California Edison Company
	Call-in Attendees	
10	Kathy Valdez	Vista Community Clinic
11	Frances Cerda	Vista Community Clinic
12	Steve Rutledge	CPUC -- Energy Division
13	Josie Webb	CPUC – Office of Ratepayer Advocates
14	Margaret Moore	Sempra Energy
15	Susan La Flam	San Diego Gas & Electric Company
16	Yvette Vazquez	San Diego Gas & Electric Company
17	Jeff Beresini	Pacific Gas and Electric Company
	Mailed in Comments	
18	Carmen Spurling	Labor’s Community Service Agency

February 14, 2001 (Pacific Energy Center, San Francisco)

Facilitated by Jeff Beresini, Pacific Gas and Electric Company

	Name	Organization/Company
1	William Parker	Community Action Agency of San Mateo
2	Roxanne Figueroa	Richard Heath and Associates, Inc.
3	Zaida Amaya	CPUC – Energy Division
4	Terri Tannehill	CPUC – Energy Division
5	Steve Rutledge	CPUC – Energy Division
6	Pete Zanzot	Southern California Edison Company
7	Jack Parkhill	Southern California Edison Company
8	Donna Jones-Moore	Southern California Gas Company
9	Sharon Lee-Balderas	Southern California Gas Company
	Call-in Attendees	
10	Susanna Selesky	Southern California Gas Company
11	Carmen Rudshagen	Southern California Gas Company
12	Susan La Flam	San Diego Gas & Electric Company
13	Margaret Moore	Sempra Energy

ATTACHMENT B
California Alternate Rates for Energy (CARE)
Comments from Public Input Workshops

Topic	Comments / Discussion	Comments From	Action	Workshop
Household Information	Adult/children breakout is not in SCE's application and probably should be consistent with the other utility applications.	Community Pantry	Incorporated	2/13/01, Downey
Household Information	Only total number of household members is necessary because some customers do not want to reveal that multiple families live in the residence. A statement that the information would be kept confidential would be desirable.	Armenian Relief Society	Utilities utilize this information for verification.	2/13/01, Downey
Household Information	Adult/children breakout is helpful when conducting post-enrollment verification of income.	PG&E, SDG&E	N/A	2/13/01, Downey
Income Information	Perhaps SCE could add an "Other" box in the income categories with a line to fill in an income source.	Armenian Relief Society	Utilities will standardize "Other Income" source.	2/13/01, Downey
Income Information	SoCalGas' application shows family size and income ranges separately, which causes confusion. It should be modeled after SCE's application which shows one income limit by family size.	Armenian Relief Society	Incorporated	2/13/01, Downey

Income Information	It is difficult to categorize certain income types that do not fit into the categories shown on the application.	Armenian Relief Society, Community Pantry, Community Rehabilitation Services	N/A	2/13/01, Downey
Income Information	Income is mentioned in three different areas of the application. It is important that the client see the table of the Maximum Household Income , but it may not be necessary for them to review all sources of household income. On the application, it states: You must count all sources of your household's income , that should suffice. This statement perfectly explains the idea, but it is followed by a list of bulleted sources of income. We would recommend eliminating the various sources of income, which would ensure the continuity of the section that states Review of Qualifications .	Labor's Community Service Agency	Utilities want to ensure customer knowledge and program integrity.	Comments submitted in writing to Energy Division
Income Information	Customers should not have to disclose their specific income. Utilities should include the <u>eligibility guidelines</u> only as reference.	CPUC, Energy Division	Utilities want to ensure program integrity.	2/14/01, San Francisco
Income Information	Listing of 'types of income' is helpful for customers as it helps them discern what they need to include to calculate their income.	CPUC, Energy Division	N/A	2/14/01, San Francisco

Account Information	There is confusion over which account number (from the multiple numbers shown on SCE's bill) to use on the CARE Application.	Community Rehabilitation Services	Incorporated	2/13/01, Downey
Account Information	The above comment is acknowledged and a clearer labeling will be made in the next revision of SCE's application.	SCE	N/A	2/13/01, Downey
Type Size and Graphics	It may help draw a customer's attention to the signature line if a graphic (such as a hand with a pen) was included on SCE and SDG&E's applications.	Vista Community Clinic	Incorporated	2/13/01, Downey
Type Size and Graphics	Emphasize the area where client is required to sign since there is a tendency for many clients to omit signing the form.	Labor's Community Service Agency	Incorporated	Comments submitted in writing to Energy Division
Type Size and Graphics	Make the type (font size) larger as it would be easier to read for seniors and seeing-impaired.	Community Action Agency of San Mateo	Variations are associated with automation and spacing constraints and PUC Directives	2/14/01, San Francisco
Referrals to Other Programs	Welfare and Gain program forms include a form with the names of agencies who can provide help in various languages. This could help avoid the CARE application from being thrown out. (Even a limited number	Armenian Relief Society	Utilities will standardize LIHEAP reference and maintain flexibility to	2/13/01, Downey

	of agencies would be helpful.)		incorporate other referrals. Limited space constraints.	
Referrals to Other Programs	Multiple sources for help frustrates customers because they get passed around too much. Challenges need to be overcome.	Community Pantry	N/A	2/13/01, Downey
Referrals to Other Programs	Information phone lines are available at the county level to provide references to other programs.	SoCalGas	Limited space constraints	2/13/01, Downey
Referrals to Other Programs	State information phone number would be helpful.	SCE	Limited space constraints	2/13/01, Downey
Referrals to Other Programs	Utility phone centers are equipped to handle foreign languages.	SCE	N/A	2/13/01, Downey
Referrals to Other Programs	The referrals to other programs can be very helpful to customers. Expand referral for CSD to include <u>all</u> program elements.	CPUC, Energy Division	Utilities will standardize LIHEAP reference	2/14/01, San Francisco
Referrals to Other Programs	SoCalGas provides LIHEAP phone number. PG&E and SDG&E provides HEAP phone number. SCE has separate sheet (which will be incorporated into the form) which refers to HEAP.	Utilities	Utilities will standardize LIHEAP reference and maintain flexibility to incorporate other referrals. Limited space constraints.	2/14/01, San Francisco
Referrals to Other Programs	Concern about LIHEAP agencies being overwhelmed with customer calls if utilities give out direct phone number to agencies.	SDG&E	N/A	2/14/01, San Francisco

Referrals to Other Programs	The fact that LIHEAP agencies are overwhelmed is an important issue that goes along with lack of funding to serve all eligible customers (less than 12% of total customer base can be served.)	Community Action Agency of San Mateo	N/A	2/14/01, San Francisco
Referrals to Other Programs	Utility has checked with CSD and they requested the referrals be directed to LIHEAP 800 number.	SoCalGas	N/A	2/14/01, San Francisco
Languages	Welfare and Gain program forms include a form with the names of agencies who can provide help in various languages. This could help avoid the CARE application being thrown out. (Even a limited number of agencies would be helpful.)	Armenian Relief Society	Utility phone centers are equipped to handle foreign languages	2/13/01, Downey
Languages	Having English and 2nd language on the same application makes it easier for customers as it provides them with the opportunity to get assistance from either or both networks. There seems to be a higher comfort level with same-language network. Makes it easier if a customer does not speak English as their primary language.	Richard Heath & Associates	All utilities have English/Spanish (varying degrees) on their applications.	2/14/01, San Francisco
Languages	All utilities have English/Spanish (varying degrees) on their applications. PG&E implemented the 1-side English/1-side 2nd language based on customer feedback.	Utilities	N/A	2/14/01, San Francisco
Languages	Having multiple languages makes it easier if the customers does not speak English as a	Richard Heath & Associates	N/A	2/14/01, San Francisco

	primary language			
Perjury Statement	The perjury statement should specify who the customer's information will be shared with (other utilities).	CPUC-Office of Ratepayer Advocates	Utilities will standardize perjury statement.	2/13/01, Downey
Perjury Statement	Simplify perjury statement so more people will read and understand it.	Armenian Relief Society	Utilities will standardize perjury statement.	2/13/01, Downey
Perjury Statement	Do not simplify the perjury statement too much.	Community Panty	Utilities will standardize perjury statement.	2/13/01, Downey
Perjury Statement	Reword the 'rebill' language.	Vista Community Clinic	Utilities will standardize perjury statement.	2/13/01, Downey
Perjury Statement	Rebilling is discretionary to allow utilities some flexibility. The wording "may" came directly from the CPUC.	SCE and SoCalGas	Utilities will standardize perjury statement.	2/13/01, Downey
Perjury Statement	Three draft versions of a perjury statement were discussed. The participants reached a consensus on wording.	All Workshop Participants	Utilities will standardize perjury statement.	2/13/01, Downey
Perjury Statement	Annual recertification would be better than telling customer to notify the utilities of ineligibility (because customers are not likely to do so).	Armenian Relief Society	Utilities will standardize perjury statement.	2/13/01, Downey
Perjury Statement	Group found that draft version #3 was the easiest for the customer to understand.	All Workshop Participants	Utilities will standardize perjury statement.	2/14/01, San Francisco

Perjury Statement	The last sentence of example 1 provides a better description of the referral system.	Richard Heath and Associates	Utilities will standardize perjury statement.	2/14/01, San Francisco
Perjury Statement	The reference to 'sharing information' could cause customers concern (who do we share with, what type of information is shared, etc.).	Community Action Agency of San Mateo	Utilities will standardize perjury statement.	2/14/01, San Francisco
Perjury Statement	This statement is provided so customers are informed about their information being shared (privacy right).	SoCalGas	Utilities will standardize perjury statement.	2/14/01, San Francisco
Perjury Statement	All utilities have confidentiality agreements between utility/contractor/agency that includes a customer confidentiality clause as well as non-disclosure agreements between the utilities.	Utilities	Utilities will standardize perjury statement.	2/14/01, San Francisco
Perjury Statement	Include a box that can be checked stating that the customer does not want their information shared.	Community Action Agency of San Mateo	Utilities will standardize perjury statement.	2/14/01, San Francisco
Perjury Statement	Customers are not aware of the utilities' inner-workings and agreements with outside parties about confidentiality and information sharing.	Community Action Agency of San Mateo	Utilities will standardize perjury statement.	2/14/01, San Francisco
Perjury Statement	CAA of San Mateo does not give out any customer information without a subpoena and feels it is imperative to protect the low-income customers (as they are often a target for unscrupulous marketing).	Community Action Agency of San Mateo	Utilities will standardize perjury statement.	2/14/01, San Francisco

Perjury Statement	Utilities do not have the system technology to 'flag' customers in the system to indicate that they should be excluded from information exchange.	Utilities	Utilities will standardize perjury statement.	2/14/01, San Francisco
Overall Application	Application should be kept as simple as possible.	Armenian Relief Society	N/A	2/13/01, Downey
Overall Application	Although customers like to know everything on the CARE application, there is too much verbiage.	Vista Community Clinic	Utilities want to insure customers are aware of program requirements.	2/13/01, Downey
Overall Application	There may be a tendency to provide as much information as possible on the CARE application to help ensure the customer understands the program, avoiding later removal from the program because of misunderstanding.	SoCalGas	N/A	2/13/01, Downey
Overall Application	CARE applications are designed to reach as many customers as possible and this seems to work okay. Simpler language probably would be desirable.	SCE	N/A	2/13/01, Downey
Overall Application	The ULTS application only requires a signature and date - very simple application.	Armenian Relief Society	Utilities want to ensure customer knowledge and program integrity.	2/13/01, Downey

Overall Application	The application includes too much information. It has been our experience that the clients misunderstand certain areas of the application and tend to feel a bit intimidated by it. It is particularly overwhelming for those with limited or monolingual speaking abilities. Simplify the application form by eliminating those parts that only seem to complicate the process.	Labor's Community Service Agency	Utilities want to ensure customers are aware of program requirements	Comments submitted in writing to Energy Division
Overall Application	Would be better to have the customer information pre-printed on the applications.	CPUC, Energy Division	SoCalGas and PG&E currently provide-automation is an issue for the other two utilities.	2/14/01, San Francisco
Overall Application	SoCalGas and PG&E currently have that capability and send out applications with pre-printed information whenever possible.	SoCalGas and PG&E	N/A	2/14/01, San Francisco
Overall Application	Have the forms available on line.	Richard Heath and Associates	SoCalGas and PG&E currently provide variation-automation is an issue for the other two utilities.	2/14/01, San Francisco
Overall Application	PG&E has a 'printable' application on line, but does not have on-line submittal (there are outstanding legal issues related to the customer signature for electronic applications as well as technical issues).	PG&E	N/A	2/14/01, San Francisco

Overall Application	SoCalGas has on-line request for application, but not on-line submittal.	SoCalGas	N/A	2/14/01, San Francisco
Overall Application	The CARE form should be condensed to resemble the ULTS form (Customers check the designated service, sign and date the mail-in coupon).	CPUC, Energy Division	Utilities want to ensure customer knowledge and program integrity.	2/14/01, San Francisco
Overall Application	Informal personal study conducted by Steve among his co-workers, determined ULTS form was twice as easy to fill out compared to CARE forms.	CPUC, Energy Division	N/A	2/14/01, San Francisco
Overall Application	Discussion excerpts from D.00-01-028 (Telecommunications), page 109, (provided by CPUC Energy Division), references the Commission proposal to revise GO153 to require utilities to ask potential ULTS customers about their income level and household size in order to determine eligibility (without disclosing eligibility criteria).	CPUC, Energy Division	N/A	2/14/01, San Francisco
Overall Application	Above referenced excerpts provide for achievement of three goals in screening customers for eligibility: 1) Process should result in eligible customers enrolling in ULTS, 2) Prevent ineligible customers from enrolling, and 3) Not be unduly burdensome for utilities to administer.	CPUC, Energy Division	N/A	2/14/01, San Francisco
Overall Application	SDG&E noted that per a Commission Decision from last year, ULTS was ordered to implement a Post-Enrollment Verification	SDG&E	N/A	2/14/01, San Francisco

	(PEV) process.			
Overall Application	ULTS has a sign up fee (PacBell: \$7.50 +/-; GTE: \$8.00 +/-)	Utility Members	N/A	2/14/01, San Francisco
Overall Application	ULTS and CARE program requirements are not an exact match. ULTS does not include all household members in it's definition of household, it classifies individuals/households by financial independence. There is the possibility of having multiple ULTS 'households' in one dwelling unit, while there can only be one (per meter) per household for the utility.	SoCalGas	N/A	2/14/01, San Francisco
Overall Application	ULTS has no known penetration rates (as it relates to low-income customers)--there penetration is related to overall telephone service. The ULTS Marketing Board is currently bidding for a study on penetration/saturation (to include determine of low-income participation).	SoCalGas	N/A	2/14/01, San Francisco
Overall Application	There is no direction from the CPUC to mandate ULTS uniformity for the CARE program. The two programs have entirely different directives from the Commission and the comparison is not equitable.	SoCalGas	N/A	2/14/01, San Francisco
Overall Application	ULTS has 'phone-in' sign up (while talking to a service rep). After enrollment, application is sent to customer. If no customer response within 3 months,	CPUC, Energy Division	N/A	2/14/01, San Francisco

	customer is dropped from the rate and re-billed.			
Overall Application	PacBell had a problem w/customers who called in for the rate, never returned the application, were rebilled-then called in and enrolled again (was a continuous cycle of customer abusing the system of phone-in sign up).	PG&E	N/A	2/14/01, San Francisco
Discount	The amount of the CARE discount is not much for their clients, so there is a lack of interest. However, interest increases as energy bills increase.	Community Panty	N/A	2/13/01, Downey
Discount	Many clients have signed up for EAF/GAF funds and then add CARE when they find out about it. Some clients mistakenly believe they are already on CARE.	Community Panty	N/A	2/13/01, Downey
Discount	Agency has seen submetered bills that more clearly show the CARE discount.	Community Panty	N/A	2/13/01, Downey
Discount	Discounts shown on the energy bills confuse customers. The bills could be clearer.	CPUC-Office of Ratepayer Advocates	N/A	2/13/01, Downey
Discount	The discount is not shown on SCE's bill because the discount is it's own rate (as with the other utilities).	SCE	N/A	2/13/01, Downey
Discount	Showing CARE discount is doable on SoCalGas' bill	SoCalGas	N/A	2/13/01, Downey

Discount	Change the Income Guidelines to 60% of median income (CA) which is consistent with LIHEAP and other state programs.	Community Action Agency of San Mateo	Program eligibility likely to change with pending legislation.	2/14/01, San Francisco
General Comments	Does not see any real problems with the forms having an 'intimidation factor' for customers	Community Pantry	N/A	2/13/01, Downey
General Comments	Talking the customer through the CARE application works well. A one-on-one approach to fill out the application has been successful.	Vista Community Clinic	N/A	2/13/01, Downey
General Comments	It is still necessary to walk many customers through the CARE application because they do not read.	Community Pantry, Vista Community Clinic	N/A	2/13/01, Downey
General Comments	The agency reduces the possibility of intimidation because they instruct clients to come to them if additional information is requested by a utility such as proof of income as a result of post-enrollment verification.	Armenian Relief Society	N/A	2/13/01, Downey
General Comments	Agency advises customers about recertification and post-enrollment verification so there is no intimidation.	Community Pantry	N/A	2/13/01, Downey
General Comments	It is helpful to have one-on-one sign up for the program. Agency (or other) personnel walking customers through the form.	Richard Heath and Associates	N/A	2/14/01, San Francisco

General Comments	It makes a customer less intimidated if the program is explained via community service agency or personal contact	Richard Heath and Associates	N/A	2/14/01, San Francisco
General Comments	Literacy is a problem in enrolling customers. These customers are most effectively reached through direct contact.	Richard Heath and Associates	N/A	2/14/01, San Francisco
General Comments	Post enrollment verification (PEV) and recertification process is where many of the customers fall off the rate. Customers still need assistance with these program documents.	Richard Heath and Associates	N/A	2/14/01, San Francisco
General Comments	After initial sign up (in some instances) the originating agency informs the customer about PEV and recertification at the time of outreach. Some customers do return for assistance-others do not.	Richard Heath and Associates	N/A	2/14/01, San Francisco
General Comments	Wanted to know what % of customers that call in for an application actually get placed on the rate (the utilities did not have that information available as it is not consistently tracked by all utilities. (PG&E finds a lot of duplication.)	Richard Heath and Associates	N/A	2/14/01, San Francisco

Attachment C

Care Application


Sample Form 14-338

Cal. P.U.C. Sheet No.	Title of Sheet	Cancelling Cal. P.U.C. Sheet No.
Revised 28448-E	Application Form California Alternate Rates For Energy (CARE), Form 14-338	Revised 27247-E
Revised 28449-E Revised 28450-E	Table of Contents Table of Contents	Revised 28437-E Revised 28396-E

The California Alternate Rates for Energy (CARE) provides a 15% discount off

your electric bill for your **permanent primary residence**, if you meet the qualifications and income guidelines. To apply for this discount, please complete and mail this application. You will receive the discount beginning on the next bill after your completed, signed application is received and approved by Edison.

15%

Tear off. 

Maximum Household Income (Ingreso Maximo en el Hogar) Effective as of June 1, 2001	
Number of Persons in Household	Total Combined Annual Income
1-2	\$XX,XXX
3	XX,XXX
4	XX,XXX
5	XX,XXX

Add \$X,XXX for each additional person.

CARE APPLICATION

Entire application must be completed and signed. Application effective as of June 1, 2001.

I certify:

- The Edison bill is in my name.
- I am not claimed on another person's income tax return.
- I will renew my application when requested by Edison.
- For CARE, the definition of "gross (before taxes) household income" is all money and noncash benefits, available for living expenses, from all sources, both taxable and nontaxable, before deductions, including expenses, for all people who live in my home. This includes, but is not limited to the following:
- I will notify Edison if I no longer qualify for this rate.
- I understand Edison reserves the right to verify my household's income.

Please check (✓) ALL sources of your income.

- | | | | |
|--|---|--|--|
| <input type="checkbox"/> Wages or salaries | <input type="checkbox"/> Rental or royalty income | <input type="checkbox"/> Disability payments | <input type="checkbox"/> TANF (AFDC) |
| <input type="checkbox"/> Interest or dividends from: savings accounts, stocks or bonds, or retirement accounts | <input type="checkbox"/> Scholarships, grants, or other aid used for living expenses | <input type="checkbox"/> Workers' compensation | <input type="checkbox"/> Food stamps |
| <input type="checkbox"/> Unemployment benefits | <input type="checkbox"/> Profit from self-employment (IRS Form 1040, Schedule C, line 29) | <input type="checkbox"/> Social Security, SSI, SSP | <input type="checkbox"/> Child support |
| | | <input type="checkbox"/> Pensions | <input type="checkbox"/> Cash |
| | | <input type="checkbox"/> Insurance settlements | <input type="checkbox"/> Other income |
| | | <input type="checkbox"/> Legal settlements | <input type="checkbox"/> Spousal support |

PLEASE PRINT CLEARLY (Favor de Imprimir con Claridad)

Your Name, as shown on Edison bill (Su Nombre) _____

Your Home Address (Su Domicilio) _____

City (Ciudad) _____ ZIP (Codigo Postal) _____

() ()

Home Telephone (Teléfono particular) _____ Work Telephone (Teléfono de su trabajo) _____


Edison Service Account No. (No. de Cuenta de Servicio de Edison) _____

Number of persons in my household (Nº de personas en el hogar):

Adults (Adultos)	Children (Niños)	Total
<input type="text"/>	+ <input type="text"/>	= <input type="text"/>

Total combined annual household income (Ingressos totales al año):
See income limits above. \$

I state that the information I have provided in this application is true and correct. I agree to provide proof of income, if asked. I agree to inform Southern California Edison if I no longer qualify to receive the discount. I understand that if I receive the discount without meeting the qualifications for it, I may be required to pay back the discount I received. I understand that Southern California Edison can share my information with other utilities or their agents to enroll me in their assistance programs.

 _____ Date (Fecha) _____

Other Programs and Services You May Qualify For: LIHEAP (Low Income Home Energy Assistance Program) provides bill payment assistance, emergency bill assistance, and weatherization services. Call the Department of Community Services and Development at 1-800-433-4327 for more information. For other Edison assistance programs, call 1-800-736-4777.

한국말 안내공회는 전화 1-800-628-3061

Tin tức bằng Việt, liên lạc 1-800-327-3031

தமிழ்ச்சொல்வழி 1-800-843-1309

中文諮詢中心 電話 1-800-843-8343

Llame a la Línea de Asistencia de Edison, 8 a.m. to 5 p.m. Lunes a viernes excepto días de fiesta: 1-800-447-6620

?Qué puedo hacer si tengo preguntas?

Call Edison's CARE Helpline, 8 a.m. to 5 p.m. Monday through Friday except holidays: 1-800-447-6620

If you have questions:

Rancho Cucamonga CA 91729-6400

P O Box 6400

Southern California Edison

Mail this completed application to:



SOUTHERN CALIFORNIA
EDISON[®]

An EDISON INTERNATIONAL[®] Company

Application for California Alternate Rates for Energy (CARE)

Solicitud para Tarifas Alternas para Energía en California (CARE)

**You May Qualify for a
Discount on
Your Edison Bill.**

**Usted podría calificar para
recibir un descuento en su
cuenta de Edison.**

Please read this application
carefully. If you qualify,
complete and mail.

Por favor lea cuidadosamente esta
solicitud. Si usted califica, llénela
y envíela por correo.





Southern California Edison
California Alternate Rates for Energy
P O BOX 6400
Rancho Cucamonga CA 91729-6400

Put Stamp Here
Post Office
Will Not Deliver
Without Postage



Resource Code (Edison Use Only) -

 **No Staples / No Tape** 



Southern California Edison
Rosemead, California

Revised Cal. PUC Sheet No. 28448-E
Cancelling Revised Cal. PUC Sheet No. 27247-E

Sheet 1

APPLICATION FOR CALIFORNIA ALTERNATE
RATES FOR ENERGY (CARE)

Form 14-338

(To be inserted by utility)

Advice 1525-E
Decision 00-09-036

Issued by
John R. Fielder
Senior Vice President

(To be inserted by Cal. PUC)

Date Filed Mar 16, 2001
Effective Apr 5, 2001
Resolution _____



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(To be inserted by utility)
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(Continued)

(To be inserted by utility)

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