

**TURN DATA REQUEST-066**  
**SDG&E-SOCALGAS 2019 GRC – A.17-11-007/8**  
**SDG&E\_SOCALGAS RESPONSE**  
**DATE RECEIVED: APRIL 27, 2018**  
**DATE RESPONDED: MAY 11, 2018**

**Data Requests: SDG&E Customer Service – Office Operations (SDG&E-18)**

1. Regarding Advanced Metering Operations (100001.000):

- a. Please provide the same data shown on AMO 100001.000 Supplemental Workpaper 1 for 2015 actual and 2017 actual.
- b. Please provide monthly work orders from January 2015 through the latest available month in 2018.
- c. Please provide the number of Electric Meter Tester Apprentices (FTE) and money spent on these apprentices in 2017.
- d. Please provide a narrative explanation as to why recorded 2017 labor costs (\$6,594,000) were more than \$1 million below SDG&E's forecast (\$7,622,000).

**Utility Response 1:**

- a. Please see attachment TURN-SEU-DR-066 Attachment Q1a.
- b. Please see attachment TURN-SEU-DR-066 Attachment Q1b.
- c. 7.34 FTEs and \$546,350
- d. There were several factors that contributed to AMO's 2017 labor spend being lower than forecast. The primary reason was the result of delays in backfilling labor vacancies in addition to the need for AMO resources to support capital and non-GRC projects. The work performed in AMO is highly specialized and acquiring new resources with relevant experience can be difficult and time consuming due to the extensive training process.

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2. Regarding AMO100001.000 Supplemental Workpaper 2:

- a. Please provide interval data exception rates for 2017 (data on rows 15-17).
- b. Please reconcile the “daily exceptions” on rows 22-23 with the “exception rate” on rows 10-11.

**Utility Response 2:**

a.

(Field) Exception Rate	2015	2016	2017
Total Meters Requiring Interval Data	68,370	190,354	231,047
Meter Exceptions	504	960	1,525
Exception Rate	0.74%	0.50%	0.66%

- b. The exceptions detailed on rows 22-23 refer to daily back office exceptions and the exception rates detailed on rows 10-11 refer to monthly field exceptions.

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3. Regarding Billing (100003.000):

- a. What is the basis for the increase in collection agency fees? Explain why such increases should not be considered part of general inflation.
- b. Please explain why FOF has increased costs in this account for both labor and non-labor activities. Are there cost savings elsewhere?

**Utility Response 3:**

SDG&E clarifies that these questions reference workpaper 100003.000, which represents Credit & Collections costs not Billing costs. With this clarification, SDG&E responds as follows:

- a. As stated in SDG&E's testimony, Exhibit SDG&E-18, JDS-28, with the increase in the number and dollar value of customer final bills and a decrease in in-house collections resources, SDG&E has experienced a steady increase in the amount (volume and dollars) of delinquent final bills sent to outside collection agencies. Agencies are compensated based on a percentage of the monies they recover, thus the increase in the number and value of delinquent bills creates an increase in these commission payments.
- b. These FOF costs represent the costs to achieve initiatives focused on improving meter revenue protection and the overall credit and collections process the savings for which were not explicitly shown here because the benefits would impact the timing of billed revenue not O&M expenses.

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4. Regarding Billing and remittance processing:

- a. Please provide the number of customer-months billed, the number of bills mailed by SDG&E, and the number of electronic bills in each year from 2012-2016, and in each month from 2015 through the latest month in 2018.
- b. Please provide SDG&E's forecast number of customers receiving paper bills and electronic bills in 2018-2019 due to Fueling Our Future and simple decisions by customers to switch to electronic bills.
- c. Please identify all programs or other methods by which SDG&E encourages its customers to sign up for paperless billing as of the present and going into the Test Year.
- d. Please identify the number of customer payments received by SDG&E and divide them into (a) mail-in payments; (b) in person payments to payment agencies or offices; (c) electronic payments, divided into electronic funds transfer, on-line payments, credit/debit card, and all other types of electronic payment in each year from 2012-2016, and in each month from 2015 through the latest month in 2018.
- e. Please provide all available information on the cost of processing each type of payment in 2016.
- f. Please provide SDG&E's forecast of (a) mail-in payments; (b) in person payments to payment agencies or offices; (c) electronic payments, divided into electronic funds transfer, on-line payments, credit/debit card, consolidator e-bills, and all other types of electronic payment in 2017, 2018, and 2019.
- g. What are "consolidator e-Bills" and how many of them are received by SDG&E?

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**Utility Response 4:**

Q4.a. Excel file TURN-SEU-066 Attachment Q4 tabs Q4a; one showing yearly data for 2012-2016; and, one showing monthly data for 2015-2018.

Q4.b. SDG&E objects to this Request under 10.1 of the Commission’s Rules of Practice and Procedure on the grounds that it lacks foundation and calls for speculation as to the reason customers select electronic billing. Subject to and without waiving this objection, SDG&E responds as follows:

Excel file TURN-SEU-066 Attachment Q4 tab Q4b shows forecasted data. SDG&E does not have a Fueling Our Future initiative related to paperless billing.

Q4.c. SDG&E utilizes multiple methods to promote paperless billing. SDG&E prints messages on the outgoing and incoming billing envelopes, uses selective “onserts” (a separate billing page in the customer paper bill), bill inserts, bill messages, and selective use of social media advertising such as Facebook and others. Lately SDG&E has also explored the use of offering incentives such as gift cards.

Q4.d. Excel file TURN-SEU-066 Attachment Q4 tabs Q4d; one showing yearly data for 2012-2016; and, one showing monthly data for 2015-2018

Q4.e. SDG&E objects to Question 4e. under Rule 10.1 of the Commission’s Rules of Practice and Procedure on the grounds that information sought by this request is not relevant to the scope of the subject matter involved in the pending proceeding and the burden, expense and intrusiveness of this request outweighs the likelihood that the information sought will lead to the discovery of relevant and admissible evidence within the scope of the pending proceeding. Subject to and without waiving the foregoing objection, SDG&E responds as follows:

Please refer to excel file TURN-SEU-066 Attachment Q4 tab Q4e.

Q4.f. SDG&E does not forecast the number of incoming payments. Payments are processed by SoCalGas and the costs are billed to SDG&E.

Q4.g. Consolidator e-Bills are the electronic bills delivered by SDG&E through third-party vendors to customers who prefer to pay and receive their gas and electric bills through home banking websites. SDG&E is charged a (proprietary) fee to deliver these e-bills. SDG&E does not receive these bills. Refer to the two tabs in the attachment provided in response to Question 4a above for the number of consolidator e-bills delivered by SDG&E.

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5. Regarding contractual increases to software shown on SDG&E-18 workpaper page 54, please confirm that SDG&E is including the cost of software in nonlabor expenses that receive escalation for inflation, so that the 4% requested here is additional to inflation.

**Utility Response 5:**

Confirmed.

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6. Regarding Postage (1004.001):

- a. Please provide the number of bills and notices actually sent out using the US mail in each year from 2012-2016 and each month from 2015 through the latest available month in 2018.
- b. Please provide the number of bills and notices sent out using the US mail forecast by SDG&E in each of 2017-2019.
- c. Please confirm that SDG&E-18-WP page 53 shows the number of bills that would be sent were it not for electronic billing and the cost of those bills. If you cannot confirm this point, please explain what that workpaper in fact calculates and how the figures on this workpaper are used.

**Utility Response 6:**

- Q.6a. Refer to the attachment provided in response to Question Q.4a above for the number of bills and notices sent out using the US mail.
- Q.6b. Excel file TURN-SEU-066 Attachment Q6b shows forecasted volumes.
- 6.c. Yes, SDG&E confirms that SDG&E-18-WP page 53 shows the number of bills that would be sent were it not for electronic billing and the cost of those bills.

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7. Please provide the following information on call center activities annually from 2012-2017 and monthly from January 2014 through the latest available month in 2018.

- a. Total number of calls.
- b. Number of busy signals.
- c. Calls Handled by Interactive Voice Response (IVR).
- d. Calls presented to live agents (Customer Service Representatives).
- e. Abandoned Calls.
- f. Number of emergency calls as defined by SDG&E.
- g. Web and mobile self-service usage.
- h. Any performance metrics used by SDG&E in the ordinary course of business (including but not limited to percentage of calls answered by CSRs within 60 seconds and percentage of emergency calls answered within 20 seconds).
- i. Average time spent by a CSR to handle a call (Average Handle Time or AHT).
- j. Occupancy rate (with a definition)
- k. Average number of FTE of CSRs and CSR supervisors.
- l. Straight-time and overtime hours.
- m. Call Center labor costs.
- n. Call Center non-labor costs.

**Utility Response 7:**

- a. Please see TURN-SEU-066 Q7 Attachment, Tab 7a. The number of calls is the sum of ESS-answered calls w/Virtual Hold, IVR Self-Service w/Pay-by-Phone (PbP) and Abandoned Calls as shown in SDG&E-18-WP page 84 rows 3, 4, and 8.



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**Utility Response 7 Continued:**

- b. SDG&E does not track busy signals.
- c. Please see TURN-SEU-066 Q7 Attachment, Tab 7c.
- d. Please see TURN-SEU-066 Q7 Attachment, Tab 7d.
- e. Please see TURN-SEU-066 Q7 Attachment, Tab 7e.
- f. Number of emergency calls as defined by SDG&E. Gas leak and downed power lines are considered Emergency calls. Emergency calls are treated with the highest priority and quickly transferred to live agents. The data provided represents the number of customers who select the “emergency” option in the IVR and not the actual number of emergency calls as that category is defined by SDG&E. The number of emergency calls is a subset of calls presented to live agents. Please see TURN-SEU-066 Q7 Attachment, Tab 7f.
- g. Please see TURN-SEU-066 Q7 Attachment, Tab 7g.
- h. SDG&E tracks the following performance metrics:
  - Average Speed of Answer (ASA) is the average customer wait time from exiting the IVR until connected to a CSR.
  - ESS Level of Service (ESS LOS) is the percentage representation of the number of calls answered within 60 seconds by an ESS divided by the number of calls offered to the ESS, which includes agent-answered calls and abandoned calls. SDG&E does not track calls answered within 20 seconds. SDG&E’s LOS related to emergency calls is tracked within 60 seconds as detailed in TURN-SEU-066 Q7h-i.
  - Overall Level of Service is the percentage of self-serviced calls and calls answered within 60 seconds over total calls. Total calls include IVR calls, agent-answered calls and abandoned calls.
  - Average Handle Time (AHT) is the average time spent by a CSR to handle a call. Handle time includes Talk time and After-call Work.
  - Please see TURN-SEU-066 Q7 Attachment, Tab 7h-i.
- i. See response in Question 7h above.
- j. Agent occupancy, also known as agent utilization, is defined as a percentage of time call agents actually spend handling incoming calls, including after call work against the staff time or total amount of time they are plugged in and ready and waiting for calls to arrive. Occupancy is calculated by dividing call-handling time, including after call work by staff time. Please see TURN-SEU-066 Q7 Attachment, Tab 7j.

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**Utility Response 7 Continued:**

- k. SDG&E objects to Question 7k under Rule 10.1 of the Commission’s Rules of Practice and Procedure on the grounds that the information sought by this request is not relevant to the scope of the subject matter involved in the pending proceeding and the burden, expense and intrusiveness of providing monthly data outweighs the likelihood that the information sought will lead to the discovery of relevant and admissible evidence within the scope of the pending proceeding. Subject to and without waiving the foregoing objection, SDG&E responds as follows: Please see TURN-SEU-066 Q7 Attachment, Tab 7k for the 2012-2017 FTE by the following classifications for the Customer Contact Center Operations work group: Energy Service Specialists (ESS) and CCC Supervisors of the ESSs.
- l. The table below represents the 2012-2017 annual straight-time and overtime hours for the Customer Contact Center (CCC) Operations.

<b>CCC Operations 100006.000</b>		
<b>Year</b>	<b>Straight-time Hours</b>	<b>Overtime Hours</b>
2012	332,168	15,504
2013	345,657	16,026
2014	317,807	6,549
2015	290,264	11,716
2016	323,169	8,359
2017	316,512	4,743

- m. SDG&E objects to Question 7m under Rule 10.1 of the Commission’s Rules of Practice and Procedure on the grounds that the information sought by this request is not relevant to the scope of the subject matter involved in the pending proceeding and the burden, expense and intrusiveness of providing monthly data outweighs the likelihood that the information sought will lead to the discovery of relevant and admissible evidence within the scope of the pending proceeding. Subject to and without waiving the foregoing objection, SDG&E responds as follows:

The table below represents the 2012-2017 annual labor and non labor costs for the Customer Contact Center (CCC) Operations and Support work groups, which is also shown in SDG&E/CS - OFFICE OPERATIONS/EXH No. SDG&E-18-WP/Witness: J. Stewart pgs. 72 of 105 and 90 of 105 respectively.

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**Utility Response 7m Continued:**

<b>CCC Operations 100006.000</b>			
<b>Year</b>	<b>Labor 2016\$ (000)</b>	<b>Non-Labor 2016\$ (000)</b>	<b>Total</b>
2012	9,175	361	9,536
2013	9,351	389	9,740
2014	8,424	272	8,696
2015	7,972	98	8,070
2016	8,896	41	8,937
2017	8,386	62	8,448

n. Please refer to the response to Question 7m above.

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8. Please provide daily results for Items (a) to (g) and the average number of CSR operations staff on duty for each day for 2016-17.

**Utility Response 8:**

Please see TURN-SEU-066 Attachment Q8.xls.

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9. Regarding SDG&E-18, Workpaper 84 on recorded call center performance:

a. Why did the ESS level of service decline from 65% to 27.6% in 2015 and 25.4% in 2016, while the number of abandoned calls increased from 5.5% in 2014 to 22.9% in 2015 and 23.72% in 2016? Identify any specific decisions regarding call center staffing made by SDG&E that caused this result.

b. Identify reasons for the increase in Average Handle Time from 273 seconds in 2012 to 363 seconds in 2016.

**Utility Response 9:**

- a. The overall decline in LOS in 2015 and 2016 was primarily attributable to a severe staffing deficiency as a result of various internal and external factors, which increased wait times. Abandoned calls tend to increase with longer wait times. SDG&E has taken steps in 2018 to incorporate a new hiring process to mitigate current and future staffing deficiencies.
- b. The increase in Average Handle Time from 273 seconds in 2012 to 363 seconds in 2016 was due to an increase in the volume of complex calls answered by ESS's. The efficiency and effectiveness of self-service options typically handle the more routine calls, leaving complex calls (i.e. high bill, solar, electric vehicle, and rate options) to be answered by the ESS's resulting in an increase in AHT.

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10. Please explain why SoCal has a targeted ESS Level of Service of 60% (SCG-18, Workpaper page 11) while SDG&E's target is 70% (SDG&E-19, Workpaper page 86).

**Utility Response 10:**

SDG&E objects to Question 10 under Rule 10.1 of the Commission's Rules of Practice and Procedure on the grounds that the comparison the request is seeking calls for speculation. Subject to and without waiving the foregoing objection, SDG&E responds as follows:

SDG&E cannot speak to the underlying basis for SoCalGas' targeted Level of Service.

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11. Provide substantiation for the forecast assumption as to the number of additional customers that will call the call center when default TOU rates are implemented and that handle time will be 500 seconds – almost 40% longer than the current AHT of 360 seconds. (SDG&E-19 Workpaper page 88).

**Utility Response 11:**

The logic used to forecast the increase in billing-related calls due to default TOU rates in 2019 and 2020 was based on the historical rate and average handle time of billing-related calls, which included high bill inquiries, payment arrangements, and other general billing questions. In 2017, SDG&E received 0.5 calls per customer (0.026 for high bills, 0.326 for payment arrangements and 0.15 for general billing questions). The 2019 forecast assumed a 0.5 call rate from 800,000 customers who will be defaulted to the TOU rate ( $0.5 * 800,000 = 400,000$  calls), then reduced the estimate by 233,000 existing billing calls for a net increase of 167,000. For 2020, SDG&E assumed a lower call rate of 0.3 on 1,050,000 customers who will be defaulted to TOU rate ( $0.3 * 1,050,000 = 315,000$ ) then reduced the estimate by 233,000 existing calls for a net increase of 82,000 calls. Below is a snapshot of the estimation:

TOU Default start	Mar-19	Jan-20
TOU Default end	Dec-19	Dec-20
TOU default customers	800,000	1,050,000
Forecasted billing calls	400,000	315,000
Pre-existing calls	233,171	233,171
Net increase	166,829	81,829

AHT of 360 seconds is the average handle time of all calls. The complexity of TOU-related calls is comparable to high bill calls whose AHT averaged 503 seconds in the last three years (495 in 2015, 507 in 2016 and 504 in 2017). Therefore an AHT of 500 seconds is used for TOU-related calls.

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12. Please provide all the supplemental workpapers for 100006.000 in Excel format with active cells.

**Utility Response 12:**

Please see TURN-SEU-066 Attachment Q12.xls.



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13. Please provide the calculation showing the amount of labor required to raise the CSR level of service to 70% (SDGE-18-WP page 84).

**Utility Response 13:**

The actual calculation for CSR FTEs needed to raise service levels is not a manual calculation. Please refer to SDG&E-18-WP page 86 - CCC Operations 100006.000 Supplemental Workpaper 3 - e-Workforce Management FTE Requirements, rows 44-49, for the inputs that determine the FTE requirement.

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14. Please reconcile SDG&E's testimony that obtaining or verifying e-mail addresses adds 15 seconds to AHT (SDG&E-18, page JDS-54), with SDG&E's workpaper, which shows 21 seconds (SDG&E-18, WP page 87).

**Utility Response 14:**

The process consists of two distinct tasks: (1) verifying an existing email address on file which requires 15 seconds and (2) capturing a new email address which requires 31 seconds. The forecasted call volume is 1,053,335 of which 638,584 calls have an email address on file and 414,751 calls do not have an address. The weighted average handle time is 21.3 seconds on the total 1,053,335 calls. The testimony refers to 15 seconds AHT for email verification meanwhile the workpaper refers to the weighted average handle time of 21.3 seconds.

Please see TURN-SDG&E-DR-066 Q14 Attachment.xls for assumptions and detailed calculations.

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15. Regarding Account 1000008.000, please provide a narrative explanation as to why labor expenses recorded in 2017 (\$2,501,000) were 17% below forecast (\$3,005,000). Did any of the increase in recorded non-labor expenses (\$306,000) above SDG&E's forecast (\$134,000) arise from contractor costs that resulted from not being fully staffed?

**Utility Response 15:**

It would appear that TURN used 2016 forecasted labor of \$3,005,000 instead of 2017 forecasted labor of \$3,148,000 when comparing to the 2017 actual labor expense. The reasons 2017 actual labor was below 2017 forecasted labor was primarily due to a combination of labor vacancies along with the timing of resources supporting projects.