



November 9, 2023

Public Utility Commission of Oregon
 Attn: Filing Center
 201 High Street, S.E.
 P.O. Box 1088
 Salem, OR 97308-1088

RE: Advice No. 23-28, Schedule 18, Income Qualified Bill Discount (Operational Schedule)

Portland General Electric Company (PGE) submits this filing pursuant to Oregon Revised Statutes 757.205 and 757.210, and Oregon Administrative Rule (OAR) 860-022-0025, for filing proposed tariff sheet associated with Tariff P.U.C. No. 18. with a requested effective date of **January 1, 2024**:

Second Revision of Sheet No. 18-1
 Second Revision of Sheet No. 18-1

The purpose of this filing is to update Schedule 18, the operational tariff for PGE’s Income Qualified Bill Discount, reflective of OPUC Order No. 23-386 (Sixth Partial Stipulation). In parallel with the Company’s 2024 General Rate Case (UE 416), PGE and parties agreed to incorporate two new discount tiers into the current IQBD eligibility criteria to provide larger discounts to the most heavily burdened households.

The additional tiers (A and B) will provide bill discounts up to 60% to customers with gross household incomes at or below 30% of the state median income, who previously qualified for a single 25% discount. The additional granularity of tiers helps balance an increase in assistance to those who need it most while mitigating program costs that impact all customers. The table below shows the change in tier structure and discount amounts.

Eligible Percent of SMI	New Tier	New Discount Percentage	Current Tier	Current Discount Percentage
0-5%	A	60%	1	25%
6-15%	B	40%		
16-30%	C	25%		
31-45%	D	20%	2	20%
46-60%	E	15%	3	15%

Reflective of the increase to discount levels, program costs and risk exposure, PGE has bumped up the potential customer sample size for post-enrollment verification, from 3% to 10% of those customers who have only self-attested their eligibility. All other aspects of the program remain unchanged.

PGE is requesting an effective date of January 1, 2024. IQBD participants will see the new discount amounts applied to bills in which the cycle start data occurs on or after January 1, 2024.

A redline version is included as a courtesy.

To satisfy the requirements of OARs 860-022-0025(2), PGE provides the following responses:

Beyond the bill discounts provided to participating Residential Customers, there are no price impacts to PGE Customers associated with this Schedule 18 update. Cost recovery for IQBD is implemented in Schedule 118, to be updated in a future advice filing.

Please direct questions to Ashleigh Keene at ashleigh.keene@pgn.com. Please direct all formal correspondence and requests to the following email address pge.opuc.filings@pgn.com.

Sincerely,

\s\ Robert Macfarlane

Robert Macfarlane
Manager, Pricing and Tariffs

Enclosures

PGE Advice No. 23-28

Courtesy Redline of Schedule 18

SCHEDULE 18
INCOME-QUALIFIED BILL DISCOUNT - OPTIONAL

PROGRAM DESCRIPTION

This is an optional bill discount for Income-Qualified Residential customers.

AVAILABLE

In all territory served by the Company.

APPLICABLE

To Income-Qualified Residential Customers, defined as Customers with gross household income at or below 60% of Oregon State Median Income (SMI), adjusted for household size. For Customers in single-person households, eligibility is extended to those with gross household incomes up to the greater of 60% SMI or \$30,700 full-time wages at the Portland Metro minimum wage.

MONTHLY DISCOUNT

Monthly bill discounts are calculated as a percentage of bill and are offered at three-five levels, based on the enrolled Customer's household income as a percentage of SMI. ~~Tier 1 Customers with household incomes up to 30% of SMI will receive a 25% discount on their electricity bill; those in Tier 2 with household incomes between 31% and 45% of SMI will receive a 20% discount; and those in Tier 3 with household incomes between 46% and 60% of SMI (and single person households up to \$30,700) will receive a 15% discount.~~

<u>Tier</u>	<u>Eligible Percent of SMI</u>	<u>Discount Percentage</u>
<u>A</u>	<u>0-5%</u>	<u>60%</u>
<u>B</u>	<u>6-15%</u>	<u>40%</u>
<u>C</u>	<u>16-30%</u>	<u>25%</u>
<u>D</u>	<u>31-45%</u>	<u>20%</u>
<u>E¹</u>	<u>46-60%</u>	<u>15%</u>

Enrolled Customers with a verified Emergency Medical Certificate on their PGE account will be moved to the next highest discount level, if not already qualified for the highest discount level ~~(25%)~~.

The bill discount applies to most components of a Customer bill, with a small number of charges not subject to the discount. Excluded charges include the following, where applicable:

- Green Future Solar, Fixed and Habitat Optional Charges
- Solar Customer Charge for Customers on Solar Payment Option
- Energy Efficiency Funding Adjustment (Schedule 109)
- Low Income Assistance Charge (Schedule 115)
- Meter Rental and Non-Network Meter Read Charges (Schedule 300)

1. Tier E includes, for single-person households, customers with gross household incomes up to the greater of 60% SMI or full-time wages at the Portland Metro minimum wage.

Advice No. 23-28
Issued November 9, 2023
Brett Sims, Vice President

Effective for service
on and after January 1, 2024

SCHEDULE 18 (Concluded)

SPECIAL CONDITIONS

1. Program participants must be the accountholder.
2. Household size reflects all permanent residents in the home, including adults and children.

~~SPECIAL CONDITIONS (Continued)~~

3. Qualifying income refers to total gross annual income, both taxable and nontaxable, from all sources for all persons in the applicant's household.
4. The discount applies only to bills associated with the Customer's permanent primary residence and only to new charges billed after enrollment.
5. PGE Customers who have qualified for the federal Low-Income Home Energy Assistance Program (LIHEAP) or the Oregon Energy Assistance Program (OEAP) will be automatically enrolled ~~into the appropriate tier Tier 3~~. Those who also have a verified Emergency Medical Certificate on their PGE account will automatically be enrolled ~~into the next highest tier, unless they are already eligible for Tier A Tier 2~~. ~~Automatically enrolled Customers who believe they qualify for a larger discount are encouraged to submit an application and upon approval, will be moved to the appropriate tier. Should PGE be provided with detailed Customer eligibility information, automatically enrolled Customers will be placed directly in the appropriate tier.~~ Customers who do not wish to receive the discount can contact PGE to be unenrolled.
6. Customers not otherwise automatically enrolled may participate in the program after the approval of an application that includes a declaration of household size and income. Applications can be submitted directly by the Customer or a third-party on behalf of the Customer. Re-enrollment will be required every two years.
7. ~~Annually, beginning April 2023,~~ PGE will require post-enrollment verification of need from ~~a randomly selected 3% up to 10%~~ of enrolled Customers annually to continue receiving this discount. Those identified for post-enrollment verification will be randomly selected among participants who were not automatically enrolled based on their verified eligibility for LIHEAP/OEAP. If a Customer's discount is discontinued due to non-responsiveness or ineligibility, they may re-enroll upon providing verification of eligibility. Customers who were automatically enrolled based on LIHEAP or OEAP eligibility are exempt from post-enrollment verification.

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MONTHLY DISCOUNT

Monthly bill discounts are calculated as a percentage of bill and are offered at five levels, based on the enrolled Customer's household income as a percentage of SMI. (C)
(C)

Tier	Eligible Percent of SMI	Discount Percentage	(N)
A	0-5%	60%	
B	6-15%	40%	
C	16-30%	25%	
D	31-45%	20%	
E ¹	46-60%	15%	

Enrolled Customers with a verified Emergency Medical Certificate on their PGE account will be moved to the next highest discount level, if not already qualified for the highest discount level. (C)

The bill discount applies to most components of a Customer bill, with a small number of charges not subject to the discount. Excluded charges include the following, where applicable:

- Green Future Solar, Fixed and Habitat Optional Charges
- Solar Customer Charge for Customers on Solar Payment Option
- Energy Efficiency Funding Adjustment (Schedule 109)
- Low Income Assistance Charge (Schedule 115)
- Meter Rental and Non-Network Meter Read Charges (Schedule 300)

1. Tier E includes, for single-person households, customers with gross household incomes up to the greater of 60% SMI or full-time wages at the Portland Metro minimum wage. (N)
(N)

(M)

SCHEDULE 18 (Concluded)

SPECIAL CONDITIONS

1. Program participants must be the accountholder. (T)
2. Household size reflects all permanent residents in the home, including adults and children. (M)
3. Qualifying income refers to total gross annual income, both taxable and nontaxable, from all sources for all persons in the applicant's household.
4. The discount applies only to bills associated with the Customer's permanent primary residence and only to new charges billed after enrollment.
5. PGE Customers who have qualified for the federal Low-Income Home Energy Assistance Program (LIHEAP) or the Oregon Energy Assistance Program (OEAP) will be automatically enrolled into the appropriate tier. Those who also have a verified Emergency Medical Certificate on their PGE account will automatically be enrolled into the next highest tier, unless they are already eligible for Tier A.. Customers who do not wish to receive the discount can contact PGE to be unenrolled. (C)
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(C)
6. Customers not otherwise automatically enrolled may participate in the program after the approval of an application that includes a declaration of household size and income. Applications can be submitted directly by the Customer or a third-party on behalf of the Customer. Re-enrollment will be required every two years.
7. PGE will require post-enrollment verification of need from up to 10% of enrolled Customers annually to continue receiving this discount. Those identified for post-enrollment verification will be randomly selected among participants who were not automatically enrolled based on their verified eligibility for LIHEAP/OEAP. If a Customer's discount is discontinued due to non-responsiveness or ineligibility, they may re-enroll upon providing verification of eligibility. Customers who were automatically enrolled based on LIHEAP or OEAP eligibility are exempt from post-enrollment verification. (C)
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(C)