ORDER NO. 24-444

ENTERED Dec 10 2024

BEFORE THE PUBLIC UTILITY COMMISSION

OF OREGON

UM 2211

In the Matter of PUBLIC UTILITY COMMISSION OF OREGON, Implementation of House Bill 2475.	ORDER

DISPOSITION: STAFF'S RECOMMENDATION ADOPTED

At its public meeting on December 10, 2024, the Public Utility Commission of Oregon adopted Staff's recommendation in this matter. The Staff Report with the recommendation is attached as Appendix A.

BY THE COMMISSION:

Alison Lackey
Chief Administrative Law Judge

A party may request rehearing or reconsideration of this order under ORS 756.561. A request for rehearing or reconsideration must be filed with the Commission within 60 days of the date of service of this order. The request must comply with the requirements in OAR 860-001-0720. A copy of the request must also be served on each party to the proceedings as provided in OAR 860-001-0180(2). A party may appeal this order by filing a petition for review with the Circuit Court for Marion County in compliance with ORS 183.484.

ITEM NO. RA2

PUBLIC UTILITY COMMISSION OF OREGON
STAFF REPORT
PUBLIC MEETING DATE: December 10, 2024

REGULAR X **CONSENT** ____ **EFFECTIVE DATE** N/A

DATE: December 2, 2024

TO: Public Utility Commission

FROM: Bret Farrell

THROUGH: Caroline Moore, Scott Gibbens, and Curtis Dlouhy **SIGNED**

SUBJECT: OREGON PUBLIC UTILITY COMMISSION STAFF:
(Docket No. UM 2211)
Request to open a rulemaking for energy burden data collection and reporting.

STAFF RECOMMENDATION:

Staff recommends that the Oregon Public Utility Commission (Commission) approve Staff's request to open a formal rulemaking on energy burden metric reporting and issue a notice of proposed rulemaking to adopt permanent rules.

DISCUSSION:

Issue

Whether the Commission should open a formal rulemaking to adopt rules regarding the reporting of energy-burden related metrics.

Applicable Rule or Law

Pursuant to ORS 756.060, the Commission "may adopt and amend reasonable and proper rules and regulations relative to all statutes administered by the commission and may adopt and publish reasonable and proper rules to govern proceedings and to regulate the mode and manner of all investigations and hearings of public utilities and telecommunications utilities and other parties before the commission."

When adopting a new permanent rule, the Commission must follow the rulemaking procedures set forth in the Oregon Administrative Procedures Act[1] and Commission rules OAR 860-001-0160 and OAR 860-001-0210 through OAR 860-001-0240.

When opening a proposed permanent rulemaking, the Commission must give notice by publishing the notice in the Secretary of State's Oregon Bulletin at least 21 days before the effective date.[2] The Commission must also provide a copy of the proposed rule to "persons on the Commission's applicable rulemaking notification lists" at least 28 days prior the effective date and applicable legislators as specified in ORS 183.335(15) at least 49 days before the effective date.[3] The notice must include the following:

(a) A statement summarizing the subject matter, purpose, and need for the proposed rule;

(b) The last date for comment on the proposed rule;

(c) The date of or ability to request a hearing; and

(d) A statement of fiscal impact quantifying the economic effect of the proposed rule.[4]

The notice must also include a caption identifying the subject matter, a citation to the statutory authority to promulgate the rule, a statement of need, a list of principal documents, a fiscal impact statement, a statement on racial equity, if an advisory committee was appointed and, if not, why, and a request for public comment.[5]

<u>Analysis</u>

Background

The Commission opened Docket No. UM 2211 on December 14, 2021, to implement the PUC's new authority to approve differential rates and programs under House Bill 2475. House Bill 2475 expands PUC ratemaking authority regarding low-income customers and enables groups representing low-income customers and environmental justice communities to receive intervenor funding assistance. The bill contains three primary parts:

- Differential rates,
- Intervenor funding, and
- Programs to address energy burden.

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[1] O.R.S. § 183.310 to 183.355.
[2] O.R.S. § 183.335(1); OAR 860-001-0210(1).
[3] *Id.*
[4] OAR 860-001-0210(2).
[5] O.R.S. § 183.335(2).

Effectively, HB 2475 expands ORS 757.230, giving the PUC new authority in the classification or schedule of rates applicable to individual customers or groups of customers to consider differential energy burdens on low-income customers and other economic, social equity or environmental justice factors that affect affordability for certain classes of utility customers.

Within Docket No. UM 2211, Staff has two separate workstreams that address different aspects of the HB 2475 implementation process: the policy workstream and the data workstream. The remainder of this report summarizes Staff's efforts within the data workstream.

UM 2211 Data Workstream
The objective of the data workstream is twofold:

1. Develop a utility data collection strategy to enable Commission Staff to:
    a. Monitor energy burden;
    b. Facilitate the evaluation of rates, programs, and other utility activities;
    c. Enhance data transparency and accessibility; and
    d. Streamline and reduce duplicative reporting requirements.
2. Revise Division 21 Rule – OAR 860-021-0408 on disconnection reporting to better align with the data strategy.

Staff engaged with both utility and advocate stakeholders in a working group process to strategize and work through proposed data collection practices and rule revisions. Through this process, participants were able to reach agreement on a great number of technical, policy, and procedural changes, with only a handful of issues requiring further resolution.

Participants
Discussion in the process has been robust, with individuals representing many stakeholders. Parties involved include all six investor-owned electric and gas utilities operating in Oregon; Idaho Power Company, PacifiCorp, Portland General Electric Company (PGE), Avista Utilities, Cascade Natural Gas, and Northwest Natural (NWN); collectively, the Joint Utilities (JU). Other groups include the Oregon Citizens' Utility Board, NW Energy Coalition, Verde, Multnomah County Office of Sustainability, Coalition of Communities of Color, and Energy Trust of Oregon.

Energy Burden Data
Energy burden data, as defined by Staff for the purposes of this workstream, refers to metrics that measure the financial strain households face while paying for energy services. This data is crucial for identifying populations most affected by energy affordability challenges, particularly low-income households and communities facing economic or social disparities. By collecting and analyzing energy burden data, Staff can assess the effectiveness of utility programs, design equitable rate structures, and address the needs of vulnerable customers. Additionally, energy burden data provides

the foundation for evaluating the overall impact of energy policies and interventions on all residential households.

In April 2024, Staff conducted a survey where we sought feedback from stakeholders on what metrics would offer the greatest benefit in evaluating the energy-burden landscape within Oregon. Based on survey feedback key energy-burden related metrics were identified and categorized into three main categories: energy burden indicators, customer information, and program performance.

Energy Burden Indicators	**Customer Information**	**Program Performance**
Arrearage	Demographics	Program Participation
Disconnections	Income	Program Budgets
Billing and Usage	Housing Information	Other program metrics (e.g. energy savings)

These three main areas served as the basis for developing a more detailed and comprehensive list of reporting requirements for utilities.

Landscape Analysis
On June 10, 2024, Staff presented the results of the data landscape analysis to UM 2211 stakeholders. The objective of the data landscape analysis was to conduct a comprehensive inventory of the existing data resources available to the Commission, determine which relevant key energy burden metrics are currently being reported, and identify gaps in the collection of these metrics along with any other outstanding issues with data collection or reporting practices. The results of the analysis would then be used to inform revised Division 21 rules which will consolidate and enhance energy burden reporting requirements.

Staff sought to identify:

1. Whether the Commission was already collecting any of the key energy burden metrics identified by stakeholders in survey feedback,
2. Whether it was feasible to collect this information from utilities, and
3. If the information would be better collected through external data sources.

Through the landscape analysis, Staff ultimately concluded that the energy burden indicators such as arrears, disconnection, and billing and usage data were best collected directly from utilities along with utility-specific program data, while customer information such as demographics, income, and housing information was best pursued through third-party data sources, as utilities often do not have this information.

Existing Utility Data Channels
In addition to identifying specific energy burden metrics, Staff also examined through which channels data was currently being collected by the Commission.

The Commission collects different types of data from the joint utilities through various channels. Existing Commission channels for data collection include:

- Reporting Dockets (RE, RG, and RO dockets),
- Standard Data Requests (SDRs) for certain proceedings, such as general rate cases,
- Discovery, conducted during docket review, and
- Informal requests, outside of a particular docket.

Reporting dockets and SDRs offer data at more consistent and reliable intervals while data obtained through discovery and informal requests are often one-off requests from Staff that provide only a static snapshot of information. Staff's focus for the landscape analysis was primarily on reporting dockets, as these dockets provide data on an ongoing basis and fulfill the objectives of the data strategy. Ongoing data reporting requirements can establish a baseline with which to evaluate the impact of policy and program interventions, such as bill discount programs.

Existing Data Resources – Reporting Dockets
Staff's analysis identified 295 open RE, RG, and RO dockets, of which only 43 are still actively receiving reports. Among these, there are 15 universal reports, meaning that all six utilities provide the same report at a consistent interval. Staff identified four reports as providing relevant energy burden-related metrics:

1. **Disconnection Report (Docket No. RO 12)** – A quarterly report on residential disconnections and reconnections, mandated by OAR 860-021-0408. These reports contain detailed information on residential disconnections broken down at the zip code level. The data in these reports has been crucial for analyzing energy burden trends since its collection began in 2018.
2. **FERC Form 1 and 2 (Docket Nos. RE 54, RE 68, RE 78, RG 33, RG 35, RG 37)** – Annual reports from major electric and gas utilities, providing detailed financial, operational, and usage data that inform regulatory oversight and rate-setting. Utilities are required by OAR 860-027-0070 to provide these reports to the Commission each year. These reports contain relevant residential usage data but lack granularity and are only available annually, with a significant lag in reporting.
3. **Income-Qualified Bill Discount Reports (Docket Nos. RE 195, RE 197, RG 100, RG 101, RG 102)** – Quarterly reports provided by utilities on various

aspects of their IQBD programs, such as levels of participation, program costs, and billing data. Staff has required this reporting from each utility upon the implementation of their programs but specific metrics being provided vary from utility to utility. The data being provided in these reports is critical for evaluating the success of these programs and understanding how low-income customers' energy burden is evolving.

4. **Energy Trust of Oregon (ETO) Metrics (Docket Nos. RE 138, RE 139)** – An annual report provided by Portland General Electric (PGE) and PacifiCorp that summarizes communication and outreach data related to energy efficiency goals.

Issued Identified from Landscape Analysis
The landscape analysis identified three key issues with the Commission's current data collection practices.

First, there are significant gaps between what is currently being reported to the Commission by the joint utilities and what was identified by Staff and stakeholders as key energy burden related metrics. Utilities are not reporting on arrearages, customer bills, or usage data at consistent and useful intervals.

Second, there is a lack of standardization in the information that is currently being provided to the Commission by the utilities. Different utilities collect and report data using different methodologies and formats, making it difficult to compare key metrics. This variability complicates Staff's ability to draw accurate and actionable conclusions from the data.

Lastly, data was dispersed across various dockets, rather than centralized in a single location. This decentralization makes it more difficult for Staff and stakeholders to access comprehensive information efficiently, affecting both transparency and the ability to effectively monitor utility metrics.

Summary of Proposed Rule Changes
Attachment A contains Staff's proposed rule language changes for OAR 860-021-0408. Throughout the last year Staff has developed and refined this draft rule language following stakeholder feedback with the following principles from Staff's data strategy in mind:

1. There is a gap between the data that utilities currently provide to the Commission and the data that Staff and stakeholders have identified as critical in evaluating the energy burden landscape within Oregon. Any updates to rule language should include an expanded list of metrics that seek to close this gap.
2. Standardized definitions and methodologies for metrics are necessary to ensure equal comparison of data across utilities. Collaboration across utilities is needed to better align definitions.

3. Important data being provided to the Commission is currently scattered across various dockets which can make accessibility and transparency more difficult. Updated rule language should consolidate reporting into a single docket to allow for easier access.
4. Existing Commission data requirements have redundancies. Updated rule language should consolidate reporting requirements to eliminate duplicative reporting efforts from utilities.

Staff's current proposal contains the following key features:

1. An expanded list of reporting requirements that address the gaps identified by Staff and stakeholders. These new reporting requirements include areas such as arrearages, usage, and billing.
2. Expanded definitions that align metrics across utilities
3. The consolidation of all key energy burden metrics into a single reporting docket.
4. The elimination of duplicative reporting requirements for utilities.

Expanded Reporting Requirements
Staff's draft rule language builds upon existing disconnection reporting mandates in OAR 860-021-0408, significantly broadening the scope of data utilities must report.

These expanded reporting requirements will enable Staff to conduct a more comprehensive and granular analysis of energy burden across each utility's Oregon service territory. Staff believes that by capturing detailed data on arrearages, disconnections, usage, billing and program participation, the Commission will be able to gain deeper insights into the financial challenges faced by residential customers, particularly low-income households. Staff believes this data will serve a critical function in evaluating necessary policy interventions as well the performance of utility programs.

In addition to these new quarterly reporting requirements for utilities Staff recommends an annual reporting requirement which includes metrics for high-usage customers participating in a utility bill discount program. Staff defines high-usage customers as customers a residential customer participating in a utility-administered bill discount program whose energy consumption places them in the 90th percentile or above of all other bill discount program participants.

Arrearages (Quarterly)

- Total Number of Residential Customers with Arrearage Balances segmented into three groups based on the age of the arrearage including: 31-60 days, 61-90 days, and 91 or more days past the bill issuance date. Each residential customer should only be counted in one group, based on their oldest arrearage balance;

- Total residential arrearage balances segmented into three groups based on the age of the arrearage, including: 31-60 days, 61-90 days, and 91 or more days past the bill issuance date;
- Total number of customers enrolled in Time Payment Arrangements (TPA) or other extended payment plans. This includes all residential customers who are actively enrolled in a Time Payment Arrangement or any other extended payment plan offered by the utility as of the reporting period.

Disconnections (Quarterly)

- Total number of active residential accounts;
- Total number of service disconnections for non-payment;
- The total number of 15-day disconnection notices sent to residential customers;
- Percentage of accounts with service disconnections for non-payment. This includes the proportion of active residential accounts that experienced a service disconnection for non-payment during the reporting period. This percentage is determined by dividing the total number of service disconnections for non-payment by the total number of active residential accounts and multiplying by 100;
- Total number of bill discount recipient service disconnections for non-payment;
- Total number of energy assistance recipient service disconnections for non-payment;
- Total number of service disconnections for non-payment on medical certificate holder accounts;
- Number of service reconnections following a service disconnection for non-payment on the same day or next calendar day following disconnection;
- Number of service reconnections following a service disconnection for non-payment that occur more than one day and within 7 calendar days following disconnection;
- Number of days on which the energy utility was required to impose a moratorium on service disconnection for severe weather as required by OAR 860-021-0407 (Severe Weather Moratorium on Involuntary Disconnection of Residential Electric or Gas Utility Service).

Usage and Billing (Quarterly)

- Total usage by all of the utility's residential customers during the reporting period;
- Average residential usage during the reporting period. This data point should be calculated by dividing the "Total Residential Usage" by the total number of residential customers billed during the same reporting period;
- Average residential bill during the reporting period. This data point should be calculated by dividing the total amount billed to all residential customers by the total number of residential customers billed during the same reporting period.

Bill Discount Program (Quarterly)

- Total number of residential customers which received a bill discount, by discount tier;
- Total dollars provided to bill discount program participants, by discount tier;
- Total program costs divided into two distinct categories: incremental administrative costs and applied credits;
- Total number of new enrollments;
- Total number of disenrollments;
- Average program participant usage categorized by bill discount tier;
- Pre-discount average bill discount program participant bill, categorized by bill discount tier;
- Post-discount average bill discount program participant bill, categorized by bill discount by tier;
- The number of bill discount program participants with an arrearage balance segmented into three groups based on the age of the arrearage: 31-60 days, 61-90 days, and 91 or more days past the bill issuance date. Each program participant should only be counted in one group, based on their oldest arrearage balance.; and
- Total arrears balance of program participants segmented into three groups based on the age of the arrearage: 31-60 days, 61-90 days, and 91 or more days past the bill issuance date.

High Usage (Annually)

- The number of high-usage customers;
- Average monthly usage of high-usage customers;
- Average monthly bill of high-usage customers;
- Number of high-usage customers with an arrearage balance at the end of each month, segmented into three groups based on the age of the arrearage: 31-60 days, 61-90 days, and 91+ days past the bill issuance date. Each residential customer should only be counted in one group, based on their oldest arrearage balance.
- Total arrears balance of high-usage customers at the end of each month, segmented into three groups based on the age of the arrearage: 31-60 days, 61-90 days, and 91+ days past the bill issuance date; and
- Total number of high-usage customers who experienced a service disconnection for non-payment.

Standardization

A significant barrier to effective analysis of the data provided by utilities has been the lack of consistent definitions and methodologies across utilities. Discrepancies in how utilities report key metrics—such as arrearages, disconnections, and bill discount participation—have hindered the Commission's ability to compare data and identify trends. To address this, Staff's proposed rule language provides detailed definitions for all reported metrics to ensure equal comparison.

In addition to definitions, the proposal standardizes data collection and calculation methodologies. Metrics such as the percentage of accounts disconnected for non-payment and average residential usage will follow prescribed formulas to ensure consistency. Staff worked closely with stakeholders and utilities during workshops to identify the most effective approaches for achieving uniformity while acknowledging operational differences across utilities. This collaboration ensures that the standardized framework is both practical and equitable, fostering trust in the reported data and enabling the Commission to draw meaningful comparisons. There are outstanding technical items which require further discussion among stakeholder groups to ensure items are standardized across utilities. Staff addresses these ongoing implementation issues in a section below.

Centralized Reporting, Transparency, and Accessibility

Currently, data critical to understanding energy burden and utility performance is scattered across multiple dockets, creating barriers to access and reducing transparency for stakeholders. The proposed rule language addresses this challenge by consolidating all key energy burden reporting into a single docket. This centralized docket will act as a comprehensive repository for all quarterly and annual reports, covering arrearages, disconnections, usage, billing, and program participation metrics. By bringing all reporting into one location, Staff aims to enhance accessibility, streamline data analysis, and promote greater transparency.

Centralization also benefits stakeholders who rely on this data for advocacy and research. A single docket eliminates the need to navigate multiple dockets to compile a complete picture of utility performance, saving time and resources. Furthermore, the updated rule language will improve transparency by ensuring that all stakeholders have equal access to the same comprehensive dataset. This centralized approach also simplifies the reporting process for utilities.

Remove Duplicative Reporting

Existing reporting requirements often include overlapping or duplicative metrics, placing unnecessary administrative burdens on utilities and complicating data analysis for Staff and stakeholders. The proposed rule revisions address this issue by consolidating all reporting requirements into a streamlined framework that eliminates redundancy without sacrificing data quality or comprehensiveness. Metrics that are currently scattered across various reporting mandates will be integrated into a single, cohesive structure within a single docket. This consolidation reflects Staff's commitment to balancing the need for robust data with the practical realities of utility operations.

Additional Changes
Staff's proposed draft rule language also includes several procedural updates aimed at increasing accessibility and consistency.

Utilities will now have 45 days after the end of each quarter to submit their quarterly reports, an increase from the current 20-day deadline. This change is in response to utility feedback on the operational complexity of gathering large amounts of data and will allow for more time for utilities to accurately gather information.

Staff's proposed draft rule language requires that utilities must submit their quarterly reports in both Excel and PDF formats. This requirement allows for easier and more streamlined analysis for both Staff and stakeholders.

The reporting quarters have been restricted to align with traditional calendar year quarters (i.e. Q1: January – March, Q2: April – June, Q3: July – September, Q4: October – December). This adjustment replaces the existing rule's slightly irregular quarter structure, reducing potential confusion for utilities and stakeholders.

To address inaccuracies, Staff's proposed draft rule language requires utilities to submit corrected reports within 30 days if errors or omissions are detected after the initial submission. This provision ensures the integrity of the Commission's data and hold utilities accountable for providing accurate information.

Staff proposes that the effective date for reporting to begin be April 1, 2025. The utilities shall provide Staff with both the Q1 2025 report and the Q2 2025 report on the due date of the Q2 2025 report (August 14, 2025). Individual quarterly reporting will begin thereafter.

Ongoing Implementation Discussions
As the rule language is formalized with the Commission, Staff will continue to work with stakeholders on key implementation questions surrounding the reporting requirements. Resolving these questions is unlikely to impact the rule language but ensure that the reporting framework in the rules is implemented in the most useful and efficient manner.

First, is the inconsistent treatment of Time Payment Arrangements in arrearage reporting. Currently, three of the six utilities include customers with TPAs in their total arrearage calculations, while the remaining three do not. This issue complicates Staff's ability to accurately assess arrearage trends and compare data equally across all utilities. Staff is working to establish a uniform approach that ensures the comparability and consistency of arrearage data.

Second, there are discrepancies in the timelines utilities use to report arrearages. Five of the six utilities currently report arrearages based on the bill issuance date, rather than the due date. This creates inconsistency in arrearage data, as the number of days a bill is “past due” at 30 days past the issuance date may vary between utilities. Staff is working toward identifying a uniform approach to enable accurate comparison and tracking of customer payment behavior across utilities.

Lastly, to improve data consistency and streamline reporting, Staff is working on the creation of an identical, standardized form that all utilities will be required to complete and file. This form will provide predefined fields and formats for each metrics, ensuring that all utilities report data in a uniform manner. Stakeholder input will be critical in finalizing the form’s design and ensuring that it is practical for utilities to complete.

To address these issues, Staff plans to hold technical workshops with utilities to develop solutions that will produce standardized and comparable data while still working within the constraints of each utility’s internal data systems.

Conclusion

Staff appreciates all parties’ thoughtful participation in a collaborative process to identify draft rules that reflect key data strategy principles. Staff believes that stakeholders have made substantial progress and identified consensus solutions for the overarching framework of data collection practices for the Commission. Staff recommends that the Commission accept Staff’s proposed data collection rules and move UM 2211 to the formal stage.

PROPOSED COMMISSION MOTION:

Approve Staff’s request to open a formal rulemaking on energy burden metric reporting and issue a notice of proposed rulemaking to adopt permanent rules.

RA2 – UM 2211

Attachment A

OAR 860-021-0408
Arrearage and Disconnection Reporting Rule

Draft Revision

(1) As used in this rule:

(a) "Administrative costs" means all incremental expenses related to the management and operation of the bill discount program. This includes, but is not limited to, incremental costs for program design, staff salaries, data processing, customer outreach, eligibility verification, compliance, reporting, and any other overhead or indirect costs necessary to administer the program.

(b) "Applied credits" means the aggregate dollar value of discounts applied to the utility bills of residential customers that participate in the utility's bill discount program.

(c) "Arrearage balance" means any amount of money that a customer owes to the utility company for services provided which remain unpaid past the due date.

(d) "Average bill of high-usage customers" means the average monthly dollar amount the utility billed all high-usage customers.

(e) "Average bill discount program participant usage" means the average monthly usage of residential customers enrolled in a utility-administered bill discount program.

(f) "Average residential bill" means the average monthly bill for residential utility services within a utility's Oregon service territory.

(g) "Average residential usage" means the average monthly amount of energy billed per residential meter within a utility's Oregon service territory.

(h) "Average usage of high use customers" means the average monthly energy consumption of all customers classified as high usage.

(i) "Disenrollments" means residential customers who were enrolled in a utility's bill discount program as of the previous reporting period but are no longer participating as of current the reporting period. This includes customers who were removed from the program due to ineligibility or non-compliance

(j) "Energy assistance recipient" means a residential customer who has received bill payment assistance with an energy bill from any federal, state, **customer** -funded bill payment assistance fund or program at least once within the past 12 months.

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(k) "High-usage customer" means a residential customer participating in a utility-administered bill discount program whose energy consumption places them in the 90th percentile or above of all other bill discount program participants within the utility's service area.

(l) "New enrollments" means residential customers enrolled in a utility's bill discount program for the first time within the current calendar year.

(m) "Pre-discount average bill discount program participant bill" means the average monthly utility bill amount for bill discount program participants before the application of any bill discounts.

(n) "Post-discount average bill discount program participant bill" means the average monthly utility bill amount for bill discount program participants after the application of their respective bill discount.

(o) "Residential customer" means any individual or household that receives utility services for personal, non-commercial use. This includes all customers being served on a utility's residential service tariff.

(p) "Service disconnection for non-payment" means instances where utility service to a residential account was terminated due to the customer's failure to pay their utility bill.

(q) "15-day disconnection notice" means any written or electronic notification issued by a utility to a customer informing them of the utility's intent to disconnect service due to non-payment. The notice must be delivered at least 15 calendar days prior to the scheduled disconnection date.

(r) "Total arrears balance of high-usage customers" means the cumulative dollar amount of overdue balances for all high-usage customers in arrears during the reporting period.

(s) "Total arrears balance of bill discount program participants" means the total dollar amount of outstanding balances owed by residential customers enrolled in a utility-administered bill discount program on their utility bills.

(t) "Total dollars provided to bill discount program participants" means the aggregate dollar value of discounts applied to the utility bills of residential customers who participate in the utility's bill discount program.

(u) "Total bill discount program costs" means the total expenditure incurred by a utility in administering its bill discount program for low-income residential customers.

(v) "Total residential arrearage balances" means the total dollar amount of outstanding balances owed by residential customers on their utility bills.

(w) "Total residential usage" means the total amount of energy billed for all residential customers within a utility's Oregon service territory.

(x) "31-60 days in arrears" means a customer who has an arrearage balance that has been unpaid for a period of between 31 and 60 days from the original bill issuance date.

(y) "61-90 days in arrears" means A customer who has an arrearage balance that has been unpaid for a period of between 61 and 90 days from the original bill issuance date.

(z) "91+ days in arrears" means a customer who has an arrearage balance that has been unpaid for a period greater than 90 days from the original bill issuance date.

(aa)

(2) **Each energy utility must submit electronic quarterly reports containing the data described in section (4) of this rule. Electronic reports must be submitted in text-searchable excel and PDF formats. Utilities shall include zip-code level data within the accompanying excel files.** (a) For quarterly reporting purposes, the following four time periods apply: **January** 1 to **March 31**, **April** 1 to **June 30**, July 1 to **September 30**, and **October** 1 to **December** 31.

(b) Each energy utility must file its initial quarterly report following the first full quarter after the effective date of this rule, unless an alternative initial reporting date is set for the utility by **Commission Staff.**

(c) The energy utility must file a quarterly report as required under this rule within **45** days of the end of each reporting period.

Deleted: "Companywide" means the geographic area served by a particular energy utility within the state of Oregon.

Deleted: <#>"Local service area" means a smaller geographic unit within an energy utility's companywide service area, such as zip code, city, county, or other similar unit.¶

Deleted: (2) Each energy utility must file a quarterly report with the Commission detailing the number of residential disconnections for non-payment and subsequent reconnections as prescribed in this rule. An electronic report must be filed in a text-searchable Microsoft Word, Microsoft Excel, or .pdf (Adobe Acrobat) format.

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(3) **If errors or omissions are discovered after a report has been submitted, utilities must submit a revised report within 30 days of identifying the discrepancy.**

(4) The quarterly report must provide the following data points for each month within the quarter:(a) On an **Oregon** basis, **the**:

(A) Total Number of Residential Customers with Arrearage Balances segmented into three groups based on the age of the arrearage including: 31-60 days, 61-90 days, and 91or more days past the bill issuance date. Each residential customer should only be counted in one group, based on their oldest arrearage balance;

(B) Total residential arrearage balances segmented into three groups based on the age of the arrearage, including: 31-60 days, 61-90 days, and 91or more days past the bill issuance date;

(C) Total number of customers enrolled in Time Payment Arrangements (TPA) or other extended payment plans. This includes all residential customers who are actively enrolled in a Time Payment Arrangement or any other extended payment plan offered by the utility as of the reporting period;

(D) Number of active residential accounts;

(E) Number of service disconnections for non-payment;

(F) The total number of 15-ay disconnection notices sent to residential customers;

(G) Percentage of accounts with service disconnections for non-payment. **This includes the proportion of active residential accounts that experienced a service disconnection for non-payment during the reporting period. This percentage is determined by dividing the total number of service disconnections for non-payment by the total number of active residential accounts and multiplying by 100;**

(H) Total number of bill discount recipient service disconnections for non-payment;

(I) Total number of service disconnections for non-payment on energy assistance recipient accounts;

(J) Total number of service disconnections for non-payment on medical certificate holder accounts;

Deleted: (4) The quarterly report must provide the following information for each month within the quarter for an energy utility's residential accounts:

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(K) Number of service reconnections following a disconnection for non-payment on the same day or next calendar day following disconnection (Days 0-1); and

(L) Number of service reconnections following a disconnection for non-payment that occur more than one day and within 7 calendar days following disconnection (Days 2-7).

(M) Number of days on which the energy utility was required to impose a moratorium on service disconnection for severe weather per OAR 860-021-0407 (Severe Weather Moratorium on Involuntary Disconnection of Residential Electric or Gas Utility Service).

(N) Total residential usage during the reporting period;

(O) Average residential usage during the reporting period. This data point should be calculated by dividing the "Total Residential Usage" by the total number of residential customers billed during the same reporting period;

(P) Average residential bill during the reporting period. This data point should be calculated by dividing the total amount billed to all residential customers by the total number of residential customers billed during the same reporting period;

(Q) Total number of residential customers that received a bill discount, by discount tier;

(R) Total dollars provided to bill discount program participants, by discount tier;

(S) Total program costs divided into two distinct categories: incremental administrative costs and applied credits;

(T) Total number of new enrollments;

(U) Total number of disenrollments;

(V) Average program participant usage categorized by bill discount tier;

(W) Pre-discount average bill discount program participant bill, categorized by bill discount tier;

(X) Post-discount average bill discount program participant bill, categorized by bill discount by tier;

Deleted: <#>Number of service disconnections reported under both paragraph (D) and paragraph (E) above, i.e., disconnections for non-payment on medical certificate holder accounts that are also energy assistance recipient accounts;¶

(Y) The number of bill discount program participants with an arrearage balance segmented into three groups based on the age of the arrearage: 31-60 days, 61-90 days, and 91 or more days past the bill issuance date. Each program participant should only be counted in one group, based on their oldest arrearage balance.; and

(Z) Total arrears balance of program participants segmented into three groups based on the age of the arrearage: 31-60 days, 61-90 days, and 91 or more days past the bill issuance date.

(1) For annual reporting purposes, the following time period applies: January 1 to December 31.

(2) The energy utility must file a quarterly report as required under this rule within 60 days of the end of each reporting period.

(3) Each utility, in addition to the quarterly reporting requirements, shall submit an annual supplement report which provides the following information for each month within the year:

(a) The number of high-usage customers;

(b) Average monthly usage of high-usage customers;

(c) Average monthly bill of high-usage customers;

(d) Number of high-usage customers with an arrearage balance at the end of each month, segmented into three groups based on the age of the arrearage: 31-60 days, 61-90 days, and 91+ days past the bill issuance date. Each residential customer should only be counted in one group, based on their oldest arrearage balance;

(e) Total arrears balance of high-usage customers at the end of each month, segmented into three groups based on the age of the arrearage: 31-60 days, 61-90 days, and 91+ days past the bill issuance date; and

(f) Total number of high-usage customers who experienced a service disconnection for non-payment.

(4) Each utility must provide the information in 4A – M, O – R, and T-X by zip code.

(5) The Commission will review the reporting metrics outlined in this rule every two years. In doing so, the Commission may engage stakeholders to ensure the relevance of data for addressing energy burden.

Deleted: (b) For each local service area within the companywide area used for reporting:¶
(A) Number of active residential accounts;¶
(B) Number of service disconnections for non-payment;¶
(C) Number of service disconnections for non-payment on energy assistance recipient accounts;¶
(D) Number of service disconnections for non-payment on emergency medical certificate holder accounts;¶
(E) Number of service disconnections reported under both paragraph (C) and paragraph (D) above, i.e., disconnections for non-payment on medical certificate holder accounts that are also energy assistance recipient accounts; and¶
(F) Number of days on which the energy utility was required to impose a moratorium on service disconnection for severe weather per OAR 860-021-0407 (Severe Weather Moratorium on Involuntary Disconnection of Residential Electric or Gas Utility Service).¶
(c) Zip codes must be used to identify a local service area unless a different unit is pre-approved by the Commission's Consumer Services Section for a utility's use in its reporting under this rule.¶
(4) Upon request of the Commission's Consumer Services Section, when made within one year of the date a quarterly report is filed with the Commission, the energy utility must provide a breakdown by zip code of the of service disconnection data reported under section (3) of this rule.