

ORDER NO. 25-148

ENTERED Apr 17 2025

**BEFORE THE PUBLIC UTILITY COMMISSION  
OF OREGON**

AR 668

In the Matter of

Rulemaking for Energy Burden Data  
Collection and Reporting.

ORDER

DISPOSITION: ADMINISTRATIVE HEARINGS DIVISION'S RECOMMENDATION  
ADOPTED

This order memorializes our decision, made and effective at our April 15, 2025 Regular Public Meeting, to adopt the Administrative Hearings Division's recommendation, with a minor modification to delete an errant colon in section (4)(n). The Administrative Hearings Division Report with the recommendation is attached as Appendix A.

Made, entered, and effective Apr 17 2025.



**Letha Tawney**  
Commissioner



**Les Perkins**  
Commissioner



A person may petition the Oregon Public Utility Commission for the amendment or repeal of a rule under ORS 183.390. A person may petition the Oregon Court of Appeals to determine the validity of a rule under ORS 183.400.

ITEM NO. RM1

**PUBLIC UTILITY COMMISSION OF OREGON  
AHD REPORT  
PUBLIC MEETING DATE: April 15, 2025**

REGULAR \_\_\_\_ CONSENT \_\_\_\_ RULEMAKING  X  EFFECTIVE DATE  N/A

**DATE:** April 9, 2025

**TO:** Public Utility Commission

**FROM:** Christopher J. Allwein

**THROUGH:** Diane Davis, Alison Lackey **SIGNED**

**SUBJECT:** OREGON PUBLIC UTILITY COMMISSION ADMINISTRATIVE HEARINGS DIVISION (AHD): (Docket No. AR 668) Requesting the Commission adopt amendments to OAR 860-021-0408 to expand the collection of energy burden data from investor-owned utilities.

**AHD RECOMMENDATION:**

Adopt the proposed amendments to OAR 860-021-0408, to update and expand the collection of energy burden data from investor-owned utilities as presented in the Attachments.

**DISCUSSION:**

Issue

Whether the Public Utility Commission of Oregon (Commission) should adopt amendments to OAR 860-021-0408.

Applicable Law or Rule

In executing its general powers under ORS 756.040, the Commission “is vested with power and jurisdiction to supervise and regulate every public utility and telecommunications utility in this state, and to do all things necessary and convenient in the exercise of such power and jurisdiction.”

Under ORS 756.060, the Commission is authorized to “adopt and amend reasonable and proper rules and regulations relative to all statutes administered by the commission” and to “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.”

## Analysis

### *Background*

The Commission opened Docket 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.

Staff noted in the December 2, 2024 Staff Report that it engaged with both utilities and customer advocates in a working group process to strategize and work through proposed data collection practices and rule revisions. Parties in this informal process included all six investor-owned electric and gas utilities serving Oregon and several customer advocacy groups.

Staff explained that energy burden data, which refers to metrics that measure the financial strain households face while paying for energy services, 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. Energy burden data provides a foundation for evaluating the overall impact of energy policies and interventions on residential households.

On December 10, 2024, the Commission issued Order No. 24-444 in docket UM 2211, adopting Staff's recommendation to open a formal rulemaking.<sup>1</sup> Proposed rule changes were filed with the Oregon Secretary of State on January 30, 2025, to commence the formal rulemaking process. AHD served the notice to interested persons and to certain legislators as required by ORS 183.335.

The proposed rule modifications were published in the Oregon Secretary of State's February 1, 2025 Bulletin. AHD conducted a rulemaking hearing on February 27, 2025. At the rulemaking hearing, Staff proposed a few specific, additional corrections. Oregon Citizens' Utility Board (CUB) provided comments in support of the proposed rule amendments. The due date for written comments on the permanent, proposed rule amendments was March 18, 2025. Cascade Natural Gas Corporation (Cascade), and PGE filed written comments. CUB submitted four sets of comments previously filed in docket UM 2211. The recommendations in comments are discussed below.

---

<sup>1</sup> *In the Matter of Public Utility Commission of Oregon Implementation of House Bill 2475*, Order No. 24-444 (December 10, 2024).

*Discussion of Specific Recommendations*

Specific recommendations are presented below as proposed by one or more entities participating in the formal rulemaking process. Any recommendations AHD recommends the Commission adopt are shown in redline in Attachment 1. Attachment 2 contains the rules with AHD recommendations accepted.

**OAR 860-021-0408(1)(c): Definition of “Arrearage Balance”**

In the rulemaking hearing, Staff noted that the definition of “arrearage balance” did not reflect the final definition agreed to during the informal process. Staff recommends that the current definition, which states that an arrearage balance is “any amount of money that a customer owes to the utility company for services provided which remain unpaid past the due date” be changed to “any amount [...] unpaid past the ~~due~~ bill issuance date.” Cascade and PGE also note support for Staff’s modification of the definition in their comments.

AHD recommends adopting Staff’s proposed change to reflect the agreement reached among participants in the informal process.

**OAR 860-021-0408(1)(i): Definition of “Disenrollment”**

PGE recommends that disenrollments should be further clarified as “active” residential customers who were enrolled in a discount program as of the previous reporting period but not in the current reporting period. PGE states that the additional descriptor will exclude customers whose program participation ceases because they have moved away from the utility’s service territory.

AHD recommends adoption of this proposed change to the proposed definition for clarity.

**OAR 860-021-0408(1)(q) and (4)(f): Time Frame for a Residential Customer Disconnection Notice**

Staff explains that the definition and reporting requirement of a “15-day disconnection notice” in the proposed rule amendments is not aligned with OAR 860-021-0405, which requires that customers be provided with a 20-day disconnection notice. Staff recommends either updating the notice definition in subsection (1)(q) to reflect the general notice provisions in OAR 860-021-0405, or to specifically change the “15-day” requirement to a “20-day” requirement and adding a reference to OAR 860-021-0405. PGE agrees with changing the definition to align the two rules. PGE also recommends using the word provided rather than “delivered,” in reference to a utility’s action to notify customers, to further reflect the language in OAR 860-021-0405, if the specific definition is used.

In addition, proposed rule subsection OAR 860-021-0408(4)(f) requires each utility to report quarterly the number of these notices sent to residential customers. Therefore,



subsection (4)(f) would also need to be changed from “15-day disconnection notices” to “20-day disconnection notices” or “disconnection notices.”

AHD recommends adopting Staff’s proposed change of the definition to:

“Disconnection notice” means any written or electronic notification issued by a utility to a customer in accordance with OAR 860-021-0405(3).

AHD recommends modifying proposed rule subsection (4)(f) to:

Total number of ~~15-day~~ disconnection notices sent to residential customers;

These changes align the definition and rule subsection in the proposed rules with the existing disconnection notice rule in OAR 860-021-0405.

#### **OAR 860-021-0408(4)(d): Reporting Requirement for Active Small Commercial Accounts**

PGE recommends removing the proposed requirement to report the number of active small commercial customers. PGE states that it “does not see the value of this additional data if all other metrics are focused on residential customers.”<sup>2</sup> AHD notes that the small commercial customer reporting requirement was removed by Staff in its final version of the proposed rules ahead of the December 10, 2024 RPM. Due to a scrivener’s error, the requirement was mistakenly added back into this rule subsection when the proposed rules were added to the Oregon Secretary of State’s February 2025 Bulletin.

AHD recommends adopting PGE’s recommendation to remove the small commercial customer reporting requirement to correct the error and to align the rule subsection with Staff’s proposal.

#### **OAR 860-021-0408(6): Annual Reporting Requirement**

Staff notes that rule section (6) is meant to be an annual reporting requirement, due within sixty days of the end of the calendar year. Staff, PGE and Cascade all point out that the section mistakenly references quarterly reporting. Staff and PGE recommend that the language referencing “a quarterly report” be updated to state that this rule section requires “an annual report.”

AHD recommends adoption of this change to reference the correct reporting period in this rule section.

#### **Other Comments**

---

<sup>2</sup> PGE Comments at 1 (March 18, 2025).

PGE also reiterated, for clarification, that time payment arrangements (TPAs), as referenced in subsection (4)(c), are not part of PGE's active arrears reporting data. PGE explains that the balance of a customer enrolled in a TPA is no longer considered past due, and therefore is removed from active arrears data. In the event a customer fails to make TPA payments, that portion of the TPA would become past due and be included in PGE's active arrears metrics.

AHD appreciates PGE's explanation of how TPA customer accounts are categorized and notes that PGE's process for such accounts is consistent with the rules as proposed. No additional changes to the proposed rules are recommended or required.

Cascade noted recent Staff comments in UM 2211 regarding customer reenrollment data.<sup>3</sup> Cascade stated that it was uncertain whether reenrollment would be a part of AR 668, and therefore offered no additional comments. The UM 2211 Staff comments addresses reenrollment data that Staff has identified as valuable for evaluating the efficacy of current bill discount reenrollment practices. The proposed rules addressed in AR 668 do not address customer reenrollment metrics.

### **Organizational Changes for Clarity**

In addition to the recommended changes above, AHD provides a definition of "days in arrears" and lists the three numeric time-period categories for customer arrearages under this definition. AHD alphabetized the definitions to provide organizational clarity. These changes are non-substantive and intended to ensure consistency with the principles in the *Oregon Attorney General's Administrative Law Manual*.<sup>4</sup> Minor grammatical errors or omissions were also addressed.

### **Conclusion**

AHD recommends that the Commission adopt the proposed Oregon rule amendments as presented by Staff and as modified in this report to reflect the comments received during the formal rulemaking process and the non-substantive edits described above.

### **AHD RECOMMENDATION:**

Adopt the proposed amendments to OAR 860-021-0408, to update and expand the collection of energy burden data from investor-owned utilities as presented in the Attachments.

---

<sup>3</sup> *In the Matter of Public Utility Commission of Oregon, Implementation of House Bill 2475*, Staff Reenrollment Comments at 1 (March 14, 2025).

<sup>4</sup> See, *Oregon Attorney General's Administrative Law Manual* (Appendix B at B-16, section K.2 and Appendix B at B-2, section A).

## PROPOSED RULE AMENDMENTS

AMEND: 860-021-0408

RULE TITLE: Arrearage and Disconnection Reporting Rule

RULE SUMMARY: Establishes definitions and reporting requirements for energy burden related metrics to be filed by Oregon investor-owned utilities.

### RULE TEXT:

(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~~ bill issuance date.
- ~~(d)(a) "Average bill of high-usage customers" means the average monthly dollar amount the utility billed all high-usage customers.~~
- ~~(e)(d) "Average bill discount program participant usage" means the average monthly usage of residential customers enrolled in a utility-administered bill discount program.~~
- (e) "Average bill of high-usage customers" means the average monthly dollar amount the utility billed all high-usage customers.
- (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-usage customers" means the average monthly energy consumption of all customers classified as high usage.
- (i) "Days in Arrears" means the number of days from the original bill issuance date a customer's arrearage balance remains unpaid. Days in arrears are divided into three categories:
  - (A) "31-60 days in arrears" means a customer's arrearage balance has been unpaid for a period of between 31 and 60 days from the original bill issuance date.
  - (B) "61-90 days in arrears" means a customer's arrearage balance has been unpaid for a period of between 61 and 90 days from the original bill issuance date.
  - (C) "91+ days in arrears" means a customer's arrearage balance has been unpaid for a period greater than 90 days from the original bill issuance date.
- (j) "Disconnection notice" means any written or electronic notification issued by a utility to a customer in accordance with OAR 860-021-0405.

~~(j)~~(k) "Disenrollments" means active 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 the current ~~the~~ reporting period. This includes customers who were removed from the program due to ineligibility or non-compliance.

~~(j)~~(l) "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.

~~(k)~~(m) "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.

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

~~(m)~~(a) "~~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)~~(o) "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.

~~(p)~~ "~~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.~~

~~(o)~~(q) "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)~~(r) "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)~~(a) "~~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 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.~~

~~(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.~~

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

~~(w)~~(x) "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.~~

(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.

(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 on an Oregon basis:

(a) Total number of residential customers with arrearage balances segmented into three groups: 31-60 days in arrears, 61-90 days in arrears, and 91+ days in arrears. 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: 31-60 days in arrears, 61-90 days in arrears, and 91+ days in arrears;

(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 TPA or any other extended payment plan offered by the utility as of the reporting period;

(d) Number of active residential ~~and small commercial~~ accounts;

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

(f) Total number of ~~15-day~~ 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;
- (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 bill discount 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 bill discount 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;
- (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 in arrears, 61-90 days in arrears, and 91+ days in arrears. Each program participant should only be counted in one group, based on their oldest arrearage balance, and;
- (z) Total arrears balance of bill discount program participants segmented into three groups: 31-60 days in arrears, 61-90 days in arrears, and 91+ days in arrears.
- (5) For annual reporting purposes, the following time period applies: January 1 to December 31.
- (6) The energy utility must file ~~a quarterly~~ an annual report as required under this rule within 60 days of the end of each reporting period.
- (7) 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 usage of high-usage customers;
  - (c) Average 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: 31-60 days in arrears, 61-90 days in arrears, and 91+ days in arrears. 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: 31-60 days in arrears, 61-90 days in arrears, and 91+ days in arrears, and;
- (f) Total number of high-usage customers who experienced a service disconnection for non-payment.
- (8) Each utility must provide the information in section (4), subsections (a) - (m), (o) - (r) and (t) - (x) by zip code.
- (9) 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.

Statutory/Other Authority: ORS 756.060  
Statutes/Other Implemented: ORS 756.040

## PROPOSED RULE AMENDMENTS

AMEND: 860-021-0408

RULE TITLE: Arrearage and Disconnection Reporting Rule

RULE SUMMARY: Establishes definitions and reporting requirements for energy burden related metrics to be filed by Oregon investor-owned utilities.

### RULE TEXT:

- (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 bill issuance date.
  - (d) "Average bill discount program participant usage" means the average monthly usage of residential customers enrolled in a utility-administered bill discount program.
  - (e) "Average bill of high-usage customers" means the average monthly dollar amount the utility billed all high-usage customers.
  - (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-usage customers" means the average monthly energy consumption of all customers classified as high usage.
  - (i) "Days in Arrears" means the number of days from the original bill issuance date a customer's arrearage balance remains unpaid. Days in arrears are divided into three categories:
    - (A) "31-60 days in arrears" means a customer's arrearage balance has been unpaid for a period of between 31 and 60 days from the original bill issuance date.
    - (B) "61-90 days in arrears" means a customer's arrearage balance has been unpaid for a period of between 61 and 90 days from the original bill issuance date.
    - (C) "91+ days in arrears" means a customer's arrearage balance has been unpaid for a period greater than 90 days from the original bill issuance date.
  - (j) "Disconnection notice" means any written or electronic notification issued by a utility to a customer in accordance with OAR 860-021-0405.



- (k) "Disenrollments" means active 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 the current reporting period. This includes customers who were removed from the program due to ineligibility or non-compliance.
- (l) "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.
- (m) "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.
- (n) "New enrollments" means residential customers enrolled in a utility's bill discount program for the first time within the current calendar year.
- (o) "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.
- (p) "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.
- (q) "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.
- (r) "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.
- (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 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.
- (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 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.
- (w) "Total residential arrearage balances" means the total dollar amount of outstanding balances owed by residential customers on their utility bills.
- (x) "Total residential usage" means the total amount of energy billed for all residential customers within a utility's Oregon service territory.
- (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.
- (d) 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.

- (e) 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.
- (f) The energy utility must file a quarterly report as required under this rule within 45 days of the end of each reporting period.
- (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 on an Oregon basis:
  - (a) Total number of residential customers with arrearage balances segmented into three groups: 31-60 days in arrears, 61-90 days in arrears, and 91+ days in arrears. 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: 31-60 days in arrears, 61-90 days in arrears, and 91+ days in arrears;
  - (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 TPA 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) Total number of 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;
  - (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 bill discount 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 bill discount 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;
- (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 in arrears, 61-90 days in arrears, and 91+ days in arrears. Each program participant should only be counted in one group, based on their oldest arrearage balance, and;
- (z) Total arrears balance of bill discount program participants segmented into three groups: 31-60 days in arrears, 61-90 days in arrears, and 91+ days in arrears.
- (5) For annual reporting purposes, the following time period applies: January 1 to December 31.
- (6) The energy utility must file an annual report as required under this rule within 60 days of the end of each reporting period.
- (7) 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 usage of high-usage customers;
  - (c) Average 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: 31-60 days in arrears, 61-90 days in arrears, and 91+ days in arrears. 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: 31-60 days in arrears, 61-90 days in arrears, and 91+ days in arrears, and;
  - (f) Total number of high-usage customers who experienced a service disconnection for non-payment.
- (8) Each utility must provide the information in section (4), subsections (a) - (m), (o) - (r) and (t) - (x) by zip code.
- (9) 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.

Statutory/Other Authority: ORS 756.060  
Statutes/Other Implemented: ORS 756.040