Public Service Commission of Wisconsin
Customer Contact System

Utility Instructions for Responding to Customer Complaints

March 2011

We have significantly enhanced the Customer Contact System (CCS) to streamline our complaint handling process. The changes to the screens used by utility personnel to respond to complaints are explained in the following pages. Please take a few minutes to review the instructions to make sure you understand the information being requested and how to complete and submit your response. Here is a summary of the major changes made to the Utility Response screens:

What's New

- **Home page**: This is a new screen. A menu located on the left allows easy navigation through the response system. Menu options include Account History, Narrative, Upload Files, View Files, and Instructions.
- **Utility-Type of Service** is a new field in the *Current Account* section of both the *Account History* and *Narrative* screens. It is used to confirm the specific type of utility service that is involved in the complaint.
- **Current Account information** (type of service, account number, start and end dates, and past and current amounts due) now populates in the narrative response that is received by the PSC.
- **Account History**: The Account History link is used to respond to complaints involving disconnection, disconnection threat, DPA or a low income program.
  - A field was added requiring the utility to indicate whether or not the customer was contacted in response to the complaint.
  - In the *Transferred Accounts* section of the *Account History* screen, a field was added for the account holder's name.
  - In the *DPA History* section, a drop-down menu was added listing reasons for a defaulted DPA.
  - A separate button was added for "No DPA Offered."
- **Confirmation Screen:** The Confirmation Screen no longer includes the response submitted by the utility. The utility may view and/or copy its submission from the Narrative link.
- **View Files**: This is a new option that provides access to all documents attached to the complaint file.

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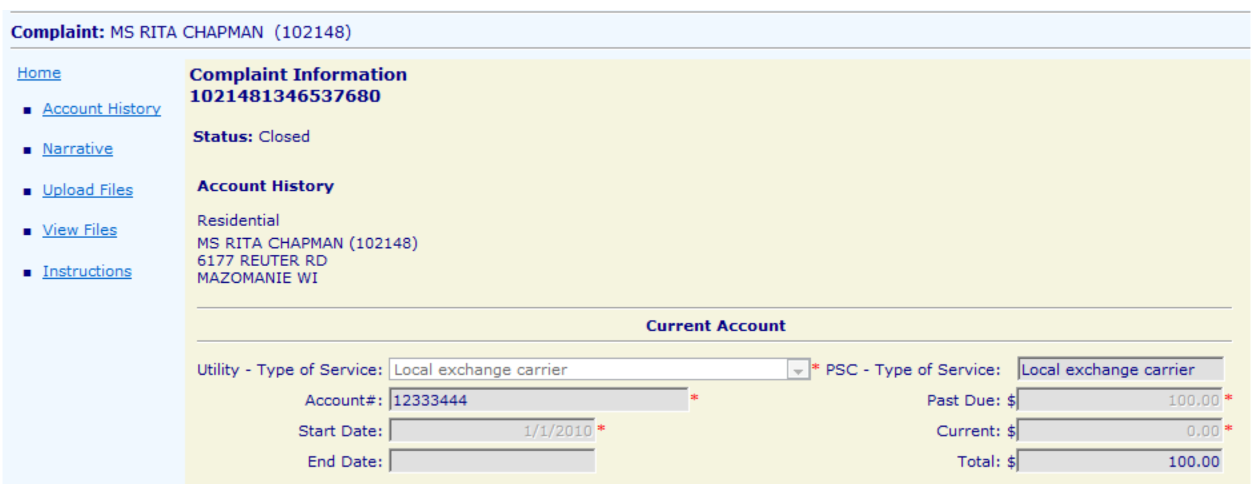
Home

The Complaint Information on the Home page reflects the customer's information as recorded by PSC staff. The menu on the left side of the Home page allows easy navigation through the response system. Menu options include Account History, Narrative, Upload Files, View Files, and Instructions.

- Account History – links to the response form for complaints involving disconnection, disconnection threat, DPA or low income programs.
- Narrative – links to the response form for complaints that do not require detailed billing and/or payment history. The Narrative link is also used to respond to follow-up contacts and/or requests for additional information from PSC staff.
- Upload Files – links to the form used to upload supporting documents to the complaint.
- View Files – links to all documents that are attached to the complaint.
- Instructions – includes instructions for responding to complaints.

The fields in the Current Account Information section cannot be completed from the Home page. The information is read-only; changes to specific fields in the Current Account Information section can be made on subsequent screens. The information automatically populates when the utility completes the Current Account Information section on either the Account History or Narrative links.

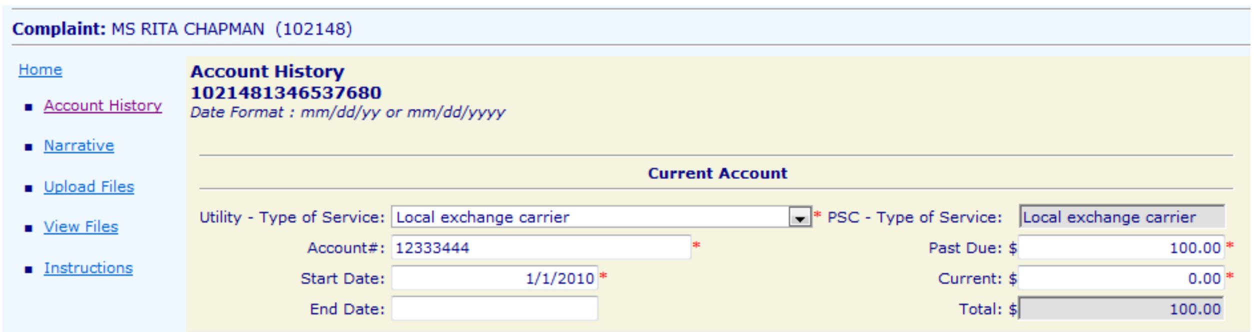


Account History

The Account History link appears on the Home page and is used to respond to complaints involving disconnection, disconnection threat, DPA or a low income program. When needed, PSC staff may ask a utility to complete the Account History information for other types of complaints. The Account History section requests information about the customer's current account, medical issues, winter payments/energy theft, transferred accounts, charges/payments for the last 12 months, and DPA history. There is also a section to add comments. Please complete the fields in each section that apply to the complaint. Required fields are noted with a red asterisk (*). Date Format is mm/dd/yy or mm/dd/yyyy.

Current Account Information

This section requests information about the customer's current utility account. Be sure to review all entries and make changes, if appropriate.


Complaint: MS RITA CHAPMAN (102148)

Home
- Account History
- Narrative
- Upload Files
- View Files
- Instructions

Account History
1021481346537680
Date Format : mm/dd/yy or mm/dd/yyyy

Current Account

Utility - Type of Service: Local exchange carrier * PSC - Type of Service: Local exchange carrier
Account#: 12333444 * Past Due: $ 100.00 *
Start Date: 1/1/2010 * Current: $ 0.00 *
End Date: Total: $ 100.00

Utility-Type of Service: Select the specific type of utility service involved in the complaint. For example, if the utility provides both water and electric service but the complaint involves disputed water usage, select "water" as the type of service involved.

Account #: Enter the customer's current account number.

Start Date: Enter the start date for the customer's current account.

End Date: Enter the end date for the customer's current account, if applicable.

Past Due: Enter the total past due amount owed by the customer, including all transferred accounts. If the customer does not have a past due balance, put "0" in this field.

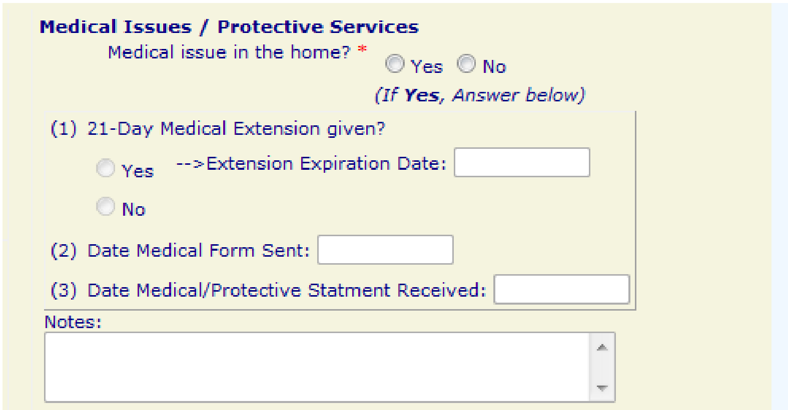
Current: Enter the current amount due on the customer's account.

Total: The system will total the amount due.

Check "Yes" or "No" to indicate if you made contact with the customer. Details concerning the contact may be added in the field to the right.

Medical Issues/Protective Services

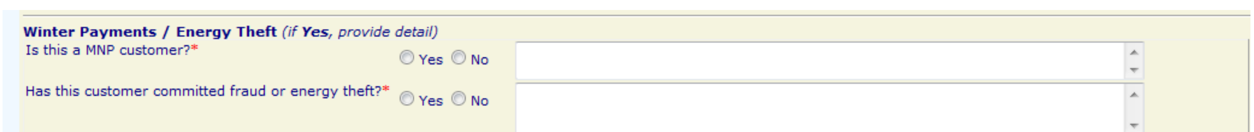
This section is used to record detailed medical information about the customer.



1. Indicate if there is a medical issue in the home.
2. If there is a medical condition, answer the remaining three questions.
3. Summarize the medical information in the “Notes” field.

Winter Payments/Energy Theft

This section is used to record information regarding winter payments and energy theft. Both questions in this section are required.



1. Select “Yes” or “No” for each question.
2. If you select “Yes” please provide a brief explanation in the field provided.

Note: “Moratorium Non-Payer” Or “MNP” refers to customers who incurred charges for electric or gas service from November 1st to April 15th that became 80 days or more past due.

Transferred Accounts

This section is used to record information regarding up to six previous accounts. Complete this section if the complaint involves transferred charges or a disputed account from a previous address. Date Format is mm/dd/yy or mm/dd/yyyy.

Note: Be sure to list each individual transferred account separately, using the address where the charges were incurred.

Transferred Accounts

	Address	Transferred Account Name	Start Date	End Date	Balance
1.					
2.					
3.					
4.					
5.					
6.					
				Transferred Account Total:	

Charges for the Last 12 Months

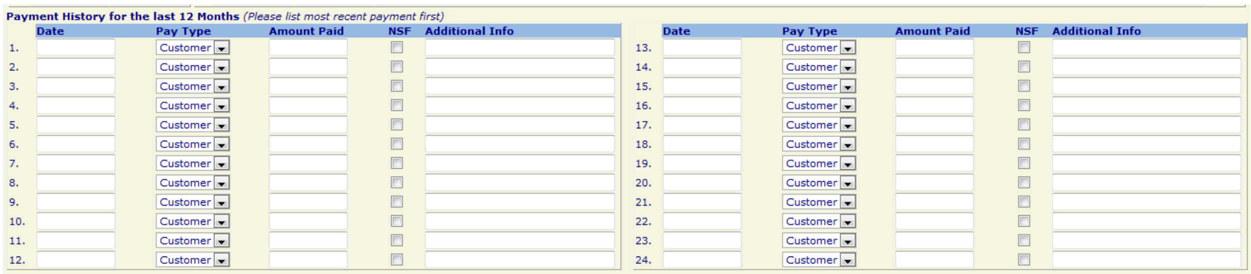
This section is used to record the utility's charges to the customer for the last 12 months. Be sure to include late fees, deposits and reconnection charges in addition to billed usage. Charges should be listed in order, beginning with the most recent charge. Date Format is mm/dd/yy or mm/dd/yyyy.

Charges for the last 12 months *(Please list most recent charge first)*

	Monthly Charges			Misc. Charges		
	Date	Amount		Date	Amount	Description
1.			1.			
2.			2.			
3.			3.			
4.			4.			
5.			5.			
6.			6.			
7.			7.			
8.			8.			
9.			9.			
10.			10.			
11.			11.			
12.			12.			

Payment History for the Last 12 Months

This section is used to record payments received during the last 12 months. Be sure to include ALL money that has been credited to the account, including payments from other sources such as Energy Assistance or charitable organizations. For payments received from outside sources, select the specific source in the **Pay Type** column. Payments should be listed in order, beginning with the most recent payment. Date Format is mm/dd/yy or mm/dd/yyyy.

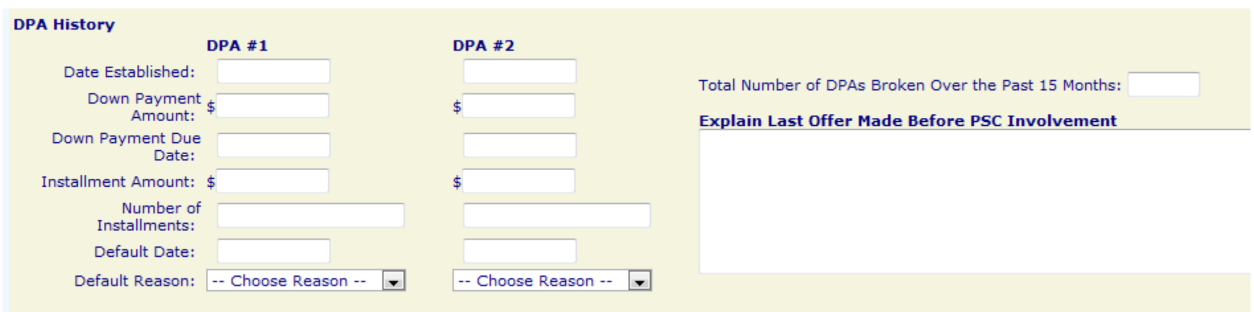


Payment History for the last 12 Months *(Please list most recent payment first)*

	Date	Pay Type	Amount Paid	NSF	Additional Info		Date	Pay Type	Amount Paid	NSF	Additional Info
1.		Customer				13.		Customer			
2.		Customer				14.		Customer			
3.		Customer				15.		Customer			
4.		Customer				16.		Customer			
5.		Customer				17.		Customer			
6.		Customer				18.		Customer			
7.		Customer				19.		Customer			
8.		Customer				20.		Customer			
9.		Customer				21.		Customer			
10.		Customer				22.		Customer			
11.		Customer				23.		Customer			
12.		Customer				24.		Customer			

DPA History

This section is used to record the customer's Deferred Payment Agreement (DPA) history for the last 15 months, including detail about the two most recent DPAs. If the customer has not established a DPA in the past 15 months, leave this section blank.



DPA History

	DPA #1	DPA #2
Date Established:		
Down Payment Amount:	$	$
Down Payment Due Date:		
Installment Amount:	$	$
Number of Installments:		
Default Date:		
Default Reason:	-- Choose Reason --	-- Choose Reason --

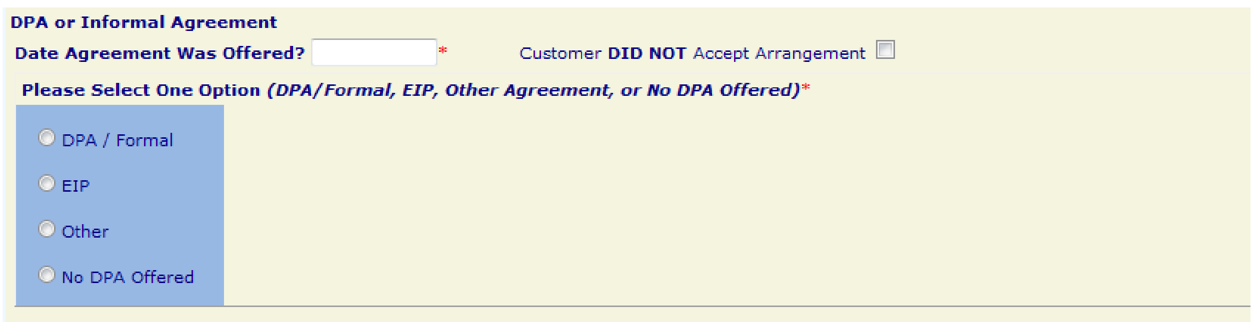
Total Number of DPAs Broken Over the Past 15 Months:

Explain Last Offer Made Before PSC Involvement

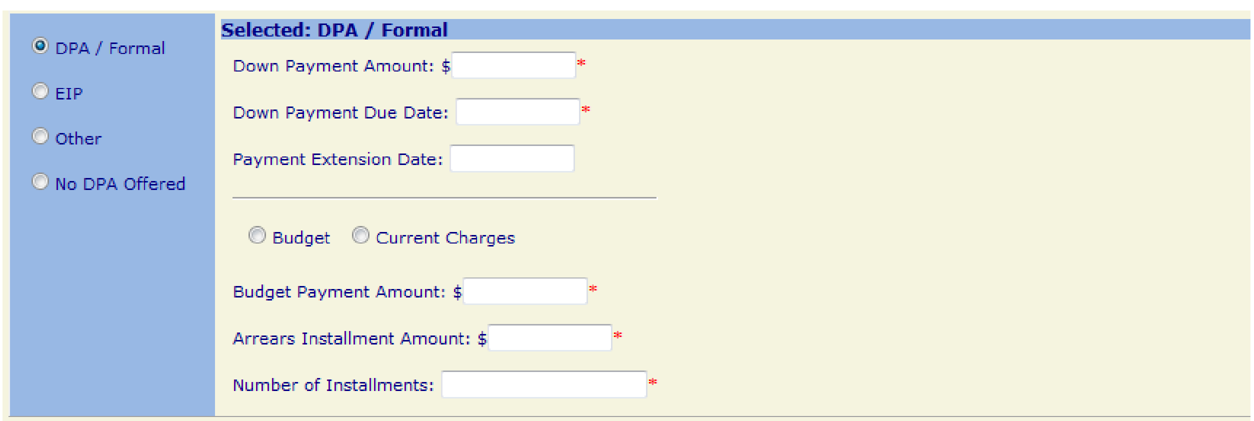
DPA or Informal Agreement

This section is used to record information regarding the terms of the DPA or other payment arrangement that is offered AFTER the customer contacts the PSC. Options include "DPA/Formal", "EIP", "Other" and "No DPA Offered." This information helps PSC staff quickly determine the terms of the offer made to the customer and is used to automatically generate a letter after the complaint is closed. If the customer was not offered a DPA or other payment arrangement, select "No DPA Offered."

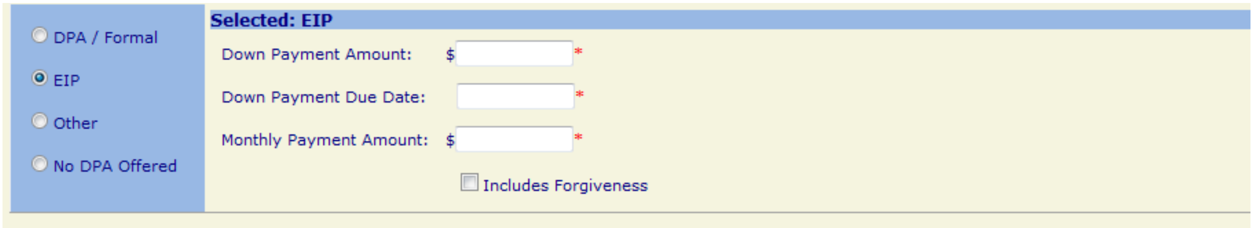
Fill in the date the agreement was offered and indicate if the offer was not accepted by the customer. Then, select either "DPA/Formal", "EIP" or "Other," as applicable, and complete the screen.



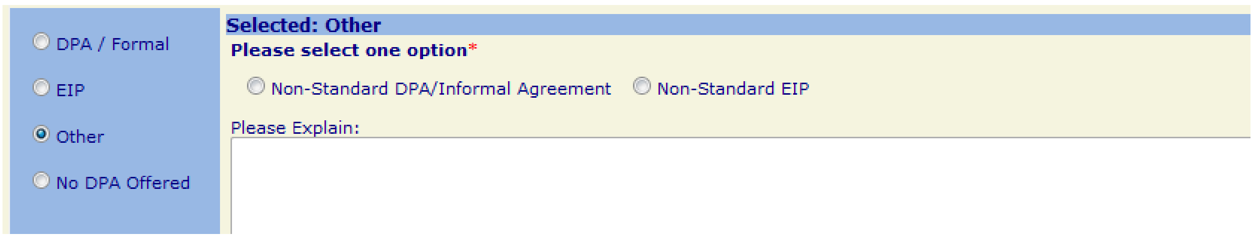
"DPA/Formal" is used for a formal DPA that includes a down payment amount and installments on the balance of the arrearage. You must also select whether the DPA includes payment of the budget amount or the current bill each month.



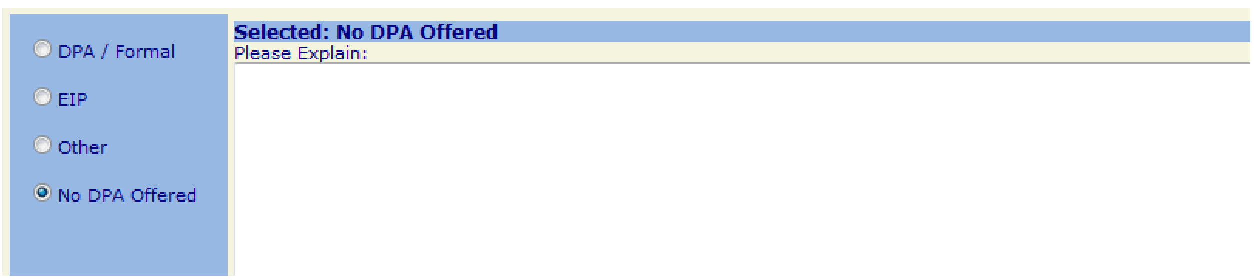
"EIP" is used for a payment agreement established through the utility's low income assistance program.



"Other" is used for all informal payment arrangements. Be sure to explain the terms of the informal payment arrangement in the area provided.

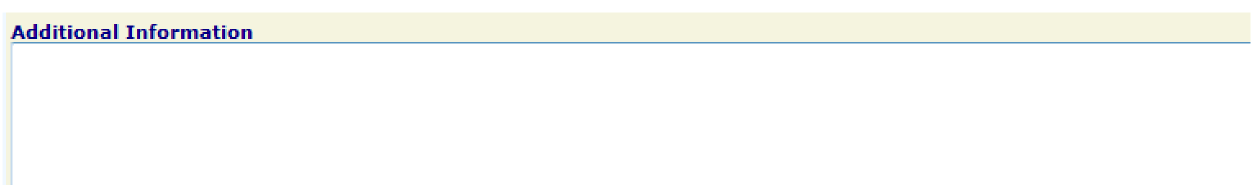


"No DPA Offered" is used when the customer was not offered a DPA. You must explain the reason why the customer was not offered a DPA in the area provided. Enter the date utility staff talked to the customer in the "Date Agreement Was Offered" field.



Additional Information

This section is used to record any additional information regarding the DPA or informal payment arrangement offered to the customer. Additional account information may also be recorded in this field.



Utility Contact Information

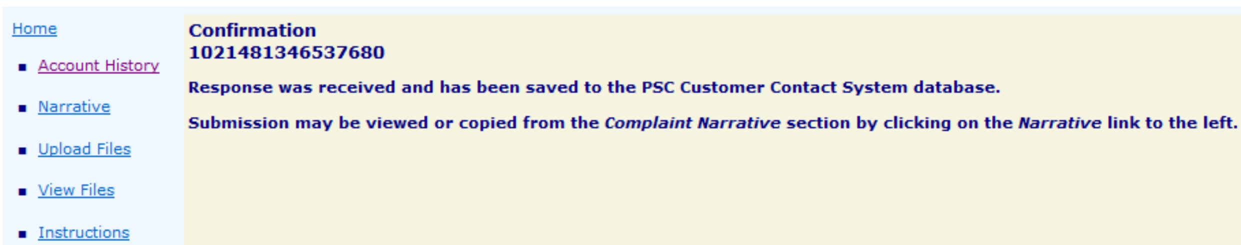
Provide the name, email address. and telephone number for the utility staff person responding to the complaint. The utility may use its general email address or the individual email address of the staff person responding to the complaint.

Submitting the Response

When you have completed your response, press the Submit button. The response will be sent to the PSC and will be attached to the complaint. If you would like to upload supporting documents to the complaint, click on the Upload Files link and follow the instructions.

Confirmation Screen

After you submit your response, a confirmation screen will appear verifying that the response was received by the PSC. You may view and/or copy your submission from the Complaint Narrative section by clicking on the Narrative link to the left.

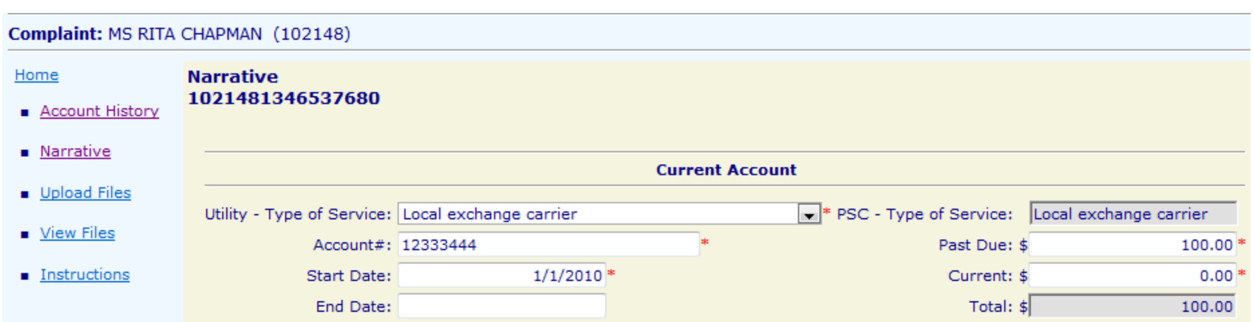


Narrative

The Narrative link appears on the Home page and is used to respond to complaints that do not require detailed billing and/or payment history. It is also used to respond to follow-up contacts and/or requests for additional information from PSC staff.

Current Account

This section requests information about the customer's current utility account. <u>Be sure to review all entries and make changes, if appropriate.</u>



Utility-Type of Service: Select the specific type of utility service involved in the complaint. For example, if the utility provides both water and electric service but the complaint involves disputed water usage, select "water" as the type of service involved.

Account #: Enter the customer's current account number.

Start Date: Enter the start date for the customer's current account.

End Date: Enter the end date for the customer's current account, if applicable.

Past Due: Enter the total past due amount owed by the customer, including all transferred accounts. If the customer does not have a past due balance, put "0" in this field.

Current: Enter the current amount due on the customer's account.

Total: The system will total the amount due.

Complaint Narrative

This section provides access to the records of calls and correspondence between the utility, customer, and PSC staff. It can also be accessed to view and/or copy the complaint response that was submitted by the utility. Required fields are noted with a red asterisk (*). Date Format is mm/dd/yy or mm/dd/yyyy.

Utility Response

Provide the date the customer was contacted and provide your response to the complaint in the space provided. If the customer was not contacted, provide an explanation.

Utility Contact Information

Provide the name, email address, and telephone number for the utility staff person responding to the complaint. The utility may use its general email address or the individual email address of the staff person responding to the complaint.

Submitting the Response

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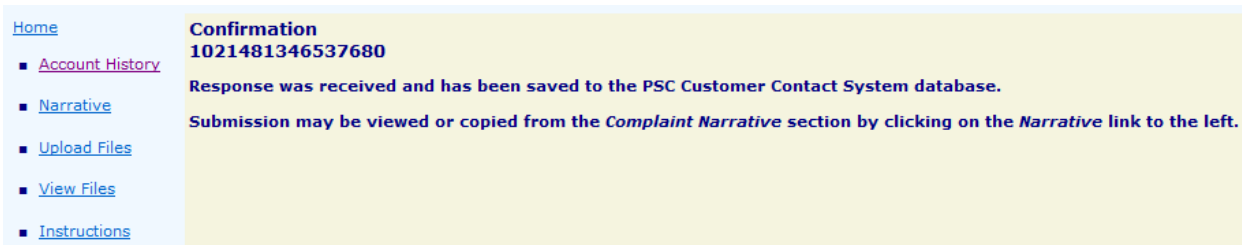
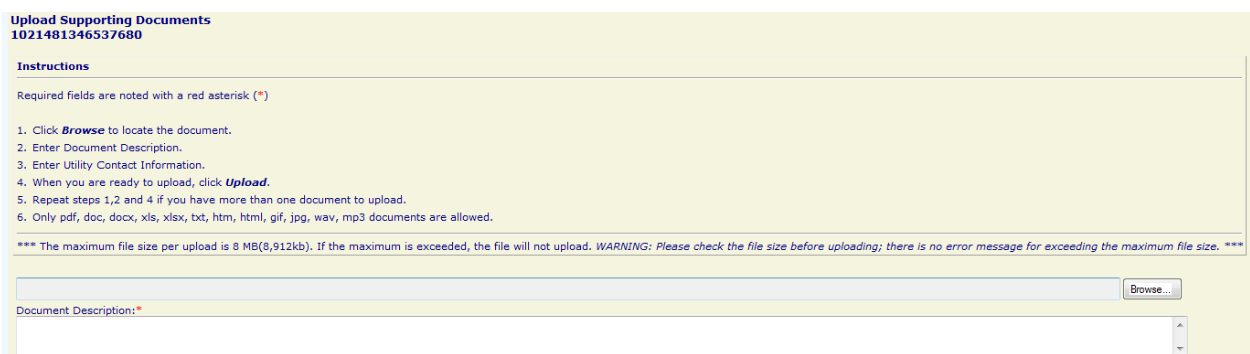


Upload Files

The Upload Files link appears on the Home page and is used to submit documents or attachments related to a complaint to the PSC. Please note: the maximum file size per upload is 8MB (8,912kb). If the maximum is exceeded, the file will not upload. Please check the file size before uploading, because there is no error message for exceeding the maximum file size.

Follow the instructions on the screen to locate and describe the document. Provide the name, email address, and telephone number for the utility staff person responding to the complaint and when complete, click “Upload.” If the document was successfully uploaded, you will receive a notification in red at the bottom of the page.



View Files

The View Files link appears on the Home page and is used to access documents that are attached to the complaint file. To open a document, click on the item you wish to view.

Error Messages

Be sure to complete all required fields on each screen before submitting a response. Required fields are noted with a red asterisk.

If you overlook a required field or provide information in an incorrect format, an error message will display by the field where the error occurred or by the "Submit" button. Complete or correct the item and press "Submit" again. If you still receive an error message, please contact the PSC IT staff listed below.

PSC Contact Information

If you have any questions or problems regarding the process of submitting a response, please feel free to contact the PSC IT staff listed below:

Rita Chapman	Rita.Chapman@Wisconsin.gov	(608) 267-9536
Gaysorn Kijjabhorn	Gaysorn.Kijjabhorn@Wisconsin.gov	(608) 267-1206