

BEFORE THE FLORIDA PUBLIC SERVICE COMMISSION

In re: Petition for approval of tariff revisions to  
implement customer relationship management  
(CRM) project, by Tampa Electric Company.

DOCKET NO. 150159-EI  
ORDER NO. PSC-15-0416-TRF-EI  
ISSUED: October 1, 2015

The following Commissioners participated in the disposition of this matter:

ART GRAHAM, Chairman  
LISA POLAK EDGAR  
RONALD A. BRISÉ  
JULIE I. BROWN  
JIMMY PATRONIS

ORDER APPROVING TARIFF REVISIONS

BY THE COMMISSION:

Background

On June 25, 2015, Tampa Electric Company (Tampa Electric or the Company) filed a petition for approval of tariff revisions related to the implementation of Tampa Electric's and Peoples Gas System's (Peoples) Customer Relationship Management (CRM) project. Tampa Electric and Peoples are both owned by TECO Energy. Tampa Electric sought approval of modifications to its levelized payment plan, deposit, and summary billing tariff provisions so as to align these provisions with those proposed by Peoples in Docket No. 150160-GU.

Currently, Tampa Electric and Peoples are served by legacy mainframe customer billing and meter information systems. The CRM project will update and modernize these systems with new hardware and software. Tampa Electric requested approval of its proposed tariff revisions to be effective on the transition date to the CRM system, expected to occur on or about July 5, 2016.

Tampa Electric and Peoples met with Commission staff and the Office of Public Counsel in noticed meetings on March 31 and June 1, 2015, to provide an overview of the CRM project. Commission staff issued one data request. On August 19, 2015, Tampa Electric filed a corrected tariff page to correct an inadvertent omission. The proposed tariff pages, as approved herein, are contained in Attachment 1. The tariff pages are in legislative format in order to display our approved changes in type-and-strike.

We have jurisdiction over this matter pursuant to Sections 366.03, 366.04, 366.05, and 366.06, Florida Statutes.

## Decision

Tampa Electric proposed changes to its levelized payment plan, deposits, and summary billing. Each of the proposed changes, as approved herein, are discussed below.

### Levelized Payment Plan

The Levelized Billing Plan is an option available to residential and small commercial customers. It is designed to levelize or smooth out the peaks and valleys in monthly payments for metered electric service. The levelized monthly payment is calculated based on average monthly consumption, including the current month, for the most recent 12 full months. The levelized amounts, which are adjusted every month, are less volatile than standard billing amounts; however, they are rarely the same for two or more consecutive months. According to Tampa Electric, most customers expect the same payment every month from a budget billing-type plan. The Company further states that continual monthly adjustments to the payment make the plan more difficult for consumers to understand and for Tampa Electric's customer service representatives to explain.

The Company proposes replacing the Levelized Payment Plan with the Budget Billing Plan, consistent with Peoples' proposed plan in Docket No. 150160-GU. Under the proposed plan, as approved herein, a monthly budgeted amount will be calculated by taking the average of the previous 12 months of electric billing amounts, including applicable taxes and fees. On the anniversary date of the customer's election to participate in the proposed plan, the monthly payment amount will be replaced with a recalculated amount based on the most current 12-month period. Any deferred balance will be trued-up by crediting next month's bill with a deferred credit or by applying 1/12 of a deferred debit to the newly calculated monthly payment amount. The Company may also recalculate the amount on a date other than the anniversary at the customer's request or at its quarterly review. If the recalculated amount differs by 15 percent or more from the budget bill, the budgeted amount may change to the recalculated amount.

The proposed Budget Billing Plan has less restrictive qualifying criteria than the current plan. Under the Levelized Billing Plan a customer must not have a balance due in order to participate, which means that the customer can only sign up for the plan between the time the current bill is paid and the next bill is received. Tampa Electric proposes that the qualification be changed so that customers without an overdue amount and no pending service disconnection for non-payment will be eligible.

### Deposits

Tampa Electric proposes to add an option for residential customers that will verify credit through an external/independent credit monitoring service to determine if the security deposit may be waived. According to Tampa Electric, the credit verification will have no impact on a customer's credit score. The Company has made this voluntary option available to customers in the past; however, the option was not described in the tariff.

Summary Billing Plan

Tampa Electric currently offers a summary billing plan to customers with ten or more accounts and no bills in arrears. Under the plan, customers receive a single date for the billing and payment of the accounts included in the plan. The current plan requires that the accounts included in summary bills be separated into groups and that the groups be billed once a month. According to the Company, most plan customers prefer to receive one bill per month; therefore, Tampa Electric proposes that the separation of accounts into groups be an option, rather than a requirement. The current plan also states that a customer's failure to pay within ten days from the mailing date of the summary bill *will* result in the customer's removal from the plan; the proposed plan replaces "will" with "may." Tampa Electric avers that this program is mutually beneficial to the customer and Company; therefore, Tampa Electric will work with customers to keep them on the program.

Communications Plan

Tampa Electric plans to carry out what it describes as a comprehensive communications plan so that customers and others affected by the proposed changes will be fully informed. The Company's plan includes the use of various owned media (e.g., bill inserts, newsletters, websites, etc.) and external media (e.g., newspaper/online advertisements, social media, press releases, etc.) to communicate the CRM project changes and benefits to its customers. The communications will be tailored to each customer segment.

Effective Date

We find that Tampa Electric's proposed tariff revisions are reasonable and are hereby approved. Tampa Electric expects the transition date of the CRM system to occur on or about July 5, 2016. The Company shall notify this Commission in writing of the actual transition date no later than 30 days prior to that date. The proposed tariff revisions, as approved herein, shall be made effective as of the actual transition date.

Based on the foregoing, it is

ORDERED by the Florida Public Service Commission that Tampa Electric Company's petition for approval of tariff revisions to implement the customer relationship management (CRM) project is hereby approved. It is further

ORDERED that Tampa Electric Company shall notify this Commission in writing of the actual transition date no later than 30 days prior to that date. It is further

ORDERED that the approved tariff revisions shall be made effective on the actual transition date. It is further

ORDERED that if a protest is filed within 21 days of issuance of the Order, any revenues collected once the tariff becomes effective shall be held subject to refund pending resolution of the protest. It is further

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ORDERED that if no timely protest is filed, this docket shall be closed upon the issuance of a Consummating Order.

By ORDER of the Florida Public Service Commission this 1st day of October, 2015.



CARLOTTA S. STAUFFER  
Commission Clerk  
Florida Public Service Commission  
2540 Shumard Oak Boulevard  
Tallahassee, Florida 32399  
(850) 413-6770  
[www.floridapsc.com](http://www.floridapsc.com)

Copies furnished: A copy of this document is provided to the parties of record at the time of issuance and, if applicable, interested persons.

KRM

NOTICE OF FURTHER PROCEEDINGS

The Florida Public Service Commission is required by Section 120.569(1), Florida Statutes, to notify parties of any administrative hearing or judicial review of Commission orders that is available under Sections 120.57 or 120.68, Florida Statutes, as well as the procedures and time limits that apply. This notice should not be construed to mean all requests for an administrative hearing or judicial review will be granted or result in the relief sought.

Mediation may be available on a case-by-case basis. If mediation is conducted, it does not affect a substantially interested person's right to a hearing.

The Commission's decision on this tariff is interim in nature and will become final, unless a person whose substantial interests are affected by the proposed action files a petition for a formal proceeding, in the form provided by Rule 28-106.201, Florida Administrative Code. This petition must be received by the Office of Commission Clerk, 2540 Shumard Oak Boulevard, Tallahassee, Florida 32399-0850, by the close of business on October 22, 2015.

In the absence of such a petition, this Order shall become final and effective upon the issuance of a Consummating Order.

Any objection or protest filed in this docket before the issuance date of this order is considered abandoned unless it satisfies the foregoing conditions and is renewed within the specified protest period.



~~THIRD-FOURTH~~ REVISED SHEET NO. 3.020  
CANCELS ~~SECOND-THIRD~~ REVISED SHEET NO. 3.020

**LEVELIZED PAYMENT PLAN BUDGET BILLING PLAN**

**(OPTIONAL)**

~~Residential Customers served under RS and General Service Customers served under GS may elect budget billing to help levelize monthly payments for metered electric service. To qualify for the levelized payment plan, a customer must have no balance owing when beginning the plan, and must not have been disqualified from the plan within the past 12 months. Tampa Electric shall have 30 days to enact the plan upon receipt and approval of the application.~~

~~The levelized monthly payment is based on the average monthly consumption, including the current month for the most recent 12 months, or available full months for new service, at the current applicable charges. Cumulative balances between the levelized monthly payments and standard billing amounts of less than \$250.00 and \$250.00 or more shall be reduced on each bill by 10% and 20% respectively. Extraneous charges not related to metered kWh are added to arrive at the current amount due.~~

~~The levelized payment plan will be continuous unless the customer requests termination from the plan, disconnection, or has more than one arrears per year initiating field collection procedures, at which time the plan will be terminated and the customer must settle his account in full. For the customer terminating from the plan but remaining on an active status, any deferred credit balance will be applied to reduce the current billing. The customer may terminate from the plan at any time. Any customer who is disqualified because of collection action may not re-join for at least 12 months.~~

~~Residential Customers taking service under Rate Schedule RS and General Service Non-Demand Customers may elect to make budgeted monthly payments of amounts due the Company to help stabilize their monthly payments. Residential customers taking service under the Residential Service Variable Pricing Rate Schedule, RSVP-1, also known as "Energy Planner", may not participate in Budget Billing. To qualify for a Budget Billing plan, a customer must have no overdue balance or pending service disconnection for non-payment when beginning the plan. The Company shall have 30 days following a Customer's request to participate in the Budget Billing Plan to implement such participation.~~

~~If a Customer requests to make budgeted payments, the initial budgeted payment amount is based on an average of the previous twelve (12) months bills due the Company, including all applicable fees and taxes. If the Customer has not received electric service from the Company for the preceding twelve (12) months, the Company will use the best information available to calculate the initial monthly payment amount. After the Customer's budgeted monthly payment amount has been initially established, the Company may recalculate the payment from time to time. If the recalculated budgeted payment amount varies by fifteen (15) percent or more from the~~

**ISSUED BY:** J. B. Ramil G. L. Gillette,  
President

**DATE EFFECTIVE:** March 1, 1997



**THIRD-FOURTH** REVISED SHEET NO. 3.020  
CANCELS **SECOND-THIRD** REVISED SHEET NO. 3.020

budgeted payment amount then in effect, the Company may begin charging the recalculated amount on Customer's next successive bill.

Any current and total deferred balance will be shown on the Customer's bill. The Customer's budgeted payment amount will be recalculated on each anniversary of the Customer's initial participation in the plan. On such recalculation, any credit deferred balance will be refunded to the Customer and one-twelfth (1/12) of any debit deferred balance will be added to the following year's recalculated budgeted monthly payment amount.

An electing Customer's participation in the Budget Billing Plan will be continuous unless the customer requests that participation in the plan be terminated, electric service is terminated, or the Customer has had more than one arrears per year initiating field collection procedures. At that time, the Customer's participation in the plan will be terminated and the Customer shall settle his account with the Company in full. If a Customer requests to terminate participation in the plan, but remains a Customer of the Company, the Customer shall pay any deferred debit balance with the next regular monthly bill, and any deferred credit balance shall be used to reduce the amount due for the next regular monthly bill. An electing customer may request that participation be terminated at any time. Any Customer who is disqualified because of collection action may not rejoin for at least twelve (12) months.

**ISSUED BY:** J. B. RamilG. L. Gillette,  
President

**DATE EFFECTIVE:** March 1, 1997



~~FIFTH-SIXTH~~ REVISED SHEET NO. 5.130  
CANCELS ~~FOURTH-FIFTH~~ REVISED SHEET NO. 5.130

Continued from Sheet No. 5.120

## 2.12 DEPOSITS

At the company's option, a deposit amount of up to two (2) month's average billing, or a suitable guarantee as security for payment for electric service, may be required at any time. Initial deposits for new premises are calculated based on the customer's submission of electrical load information. This information is then utilized to estimate average monthly usage. Initial deposits for existing premises, where typical usage has registered in the past 6 months, is calculated by accessing historical usage. If such historical usage is not available, a load calculating tool is used to establish average usage based on square footage of dwelling. As a suitable guarantee the applicant for service may furnish either (1) a satisfactory guarantor to secure payment of bills for the service requested, (2) an irrevocable letter of credit from a bank, or (3) a surety bond. For residential customers, a satisfactory guarantor shall, at the minimum, be a customer with a satisfactory payment record. For non-residential customers, a satisfactory guarantor need not be a customer of the utility. Each utility shall develop minimum financial criteria that a proposed guarantor must meet to qualify as a satisfactory guarantor. A copy of the criteria shall be made available to each new non-residential customer upon request by the customer.

After a residential customer has established a satisfactory payment record and has had continuous service for a period of twenty-three (23) months, the customer's deposit shall be refunded provided the customer has not in the preceding twelve (12) months, (a) made more than one late payment of a bill (after the expiration of twenty (20) days from the date of mailing or delivery by the company), (b) paid with a check refused by a bank, (c) been disconnected for nonpayment, or at any time, (d) tampered with the electric meter, or (e) used service in a fraudulent or unauthorized manner.

A minimum of two percent (2%) interest per annum on deposits shall be credited to the current bill annually and when deposits are refunded. Interest of three percent (3%) shall be paid on deposits of non-residential customers after the deposits have been held for twenty-three (23) months and the company elects not to refund the deposits. The deposit interest shall be simple interest in all cases. No customer depositor shall be entitled to receive interest on his deposit until and unless the customer relationship and the deposit have been in existence for a continuous period of six (6) months, then he shall be entitled to receive interest from the day of the commencement of the customer relationship and the placement of deposit.

Upon termination of service, and provided all bills have been paid in full, the deposit and accrued interest may be credited against the final account and the balance if any, shall be returned promptly to the customer within fifteen (15) days after service is discontinued.

Continued to Sheet No. [5-1405.135](#)





ORIGINAL SHEET NO. 5.135

Continued from Sheet No. 5.130

At the Residential Customer's option, the Company will verify the Customer's credit through an external credit monitoring service to determine if the customer meets the company's credit-worthiness criteria allowing the security deposit to be waived. This type of credit verification will have no impact on the Customer's credit score.

Continued to Sheet No. 5.140

ISSUED BY: G. L. Gillette, President

DATE EFFECTIVE:



~~FIRST-SECOND~~ REVISED SHEET NO. 3.025  
CANCELS ~~ORIGINAL-FIRST~~ REVISED SHEET NO. 3.025

## SUMMARY BILLING PLAN

(OPTIONAL)

A Customer with ten (10) or more Tampa Electric accounts and no bill in arrears may request a single statement for the billing and payment of those accounts under this Summary Billing Plan. With Summary Billing, the Customer designates which accounts are to be included in the plan. Those accounts ~~will may then~~ be separated into groups each of which will be billed once a month on cycle billing days as ~~designed-designated~~ by the Company.

Tampa Electric will read each meter and calculate a billing amount for each account separately. The billing amount for each of the designated accounts will be totaled on a Summary Billing statement, with each of the individual account bills attached as backup, and a single totaled bill will be included for remittance. Summary bills are due when rendered. If the summary bill is not-and-must-be paid in full within ten (10) days from the mailing date, the customer may be removed from-in-order-to-remain-on the Summary Billing Plan.

ISSUED BY: ~~G. R. Black~~ G. L. Gillette,  
President

DATE EFFECTIVE: ~~May 7, 2009~~



~~THIRTEENTH~~~~FOURTEENTH~~ REVISED SHEET NO. 3.010  
CANCELS ~~TWELFTH~~~~THIRTEENTH~~ REVISED SHEET NO.  
3.010

MISCELLANEOUS

<u>SCHEDULE</u>	<u>TITLE</u>	<u>SHEET NO.</u>
	<del>Levelized Payment Plan</del> <del>Budget Billing Plan</del> (Optional)	3.020
	Summary Billing Plan (Optional)	3.025
	Service Charges	3.030
	Home Energy Analysis	3.040
	Commercial and Industrial Energy Analysis	3.050
RSL-3	Load Management (Optional)	3.110
GSLM-1	General Service Load Management Rider	3.150
GSSG-1	Standby Generator Rider	3.200
GSLM-2	General Service Industrial Load Management Rider	3.210
GSLM-3	General Service Industrial Standby and Supplemental Load Management Rider	3.230
BERS	Building Energy-Efficient Rating System	3.250
NM-1	Net Metering Service	3.255
RE	Renewable Energy Program (Optional)	3.270

ISSUED BY: ~~G. R. Black~~ G. L. Gillette,  
President

DATE EFFECTIVE: ~~May 12, 2009~~