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March 17, 2017

**VIA ELECTRONIC FILING**

Rosemary Chiavetta, Secretary  
Pennsylvania Public Utility Commission  
Commonwealth Keystone Building  
400 North Street  
Harrisburg, PA 17120

**Re: Pennsylvania Public Utility Commission v. UGI Utilities, Inc. – Gas Division  
Docket No. R-2015-2518438**

**Office of Consumer Advocate, Office of Small Business Advocate, UGI  
Industrial Intervenors, Joseph Sandoski, Vicki L. East and Tom Harrison  
Docket Nos. C-2016-2527150, C-2016-2528559, C-2016-2529439, C-2016-  
2529638, C-2016-2534010, and C-2016-2518438**

Dear Secretary Chiavetta:

Enclosed for filing is the status report of UGI Utilities, Inc. – Gas Division (“UGI Gas”) on the implementation of certain items agreed to in the settlement of its base rate proceeding as required by Paragraph 46 of the Settlement. UGI Gas herein certifies that the agreed-upon changes have been implemented.

Copies of this document have been served as indicated on the enclosed Certificate of Service.

Very truly yours,

A handwritten signature in blue ink, appearing to read 'Danielle Jouenne', written over a blue horizontal line.

Danielle Jouenne  
Counsel for UGI Utilities, Inc. – Gas Division

Enclosure

cc: Certificate of Service

**BEFORE THE  
PENNSYLVANIA PUBLIC UTILITY COMMISSION**

Pennsylvania Public Utility Commission	:	
	:	
v.	:	Docket No. R-2015-2518438
	:	
UGI Utilities, Inc. – Gas Division	:	

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**STATUS REPORT**

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**I. INTRODUCTION**

As part of the settlement of the UGI Utilities, Inc. – Gas Division (“UGI Gas”) 2016 base rate proceeding at Docket No. R-2015-2518438 (“Settlement”), UGI Gas agreed to implement certain changes to budgets and customer-service focused practices and procedures or otherwise affirm the continuance of existent practices, as enumerated in Paragraphs 47-68 of the Settlement (“Settlement Items”). Those Settlement Items requiring affirmative implementation were addressed in the ordering paragraphs of the UGI Gas base rate proceeding final order entered October 14, 2016 (“Final Order”).

Pursuant to Paragraph 46 of the Settlement, unless specifically noted, these changes were to be implemented within ninety (90) days of the October 19, 2016 base rate increase. UGI Gas agreed to hold a one-time collaborative meeting with the parties to the base rate case to provide the parties with the opportunity to review and comment on the implementation of those changes. UGI Gas further agreed to file a status report within one hundred and fifty (150) days of the effective date of the rate increase certifying that the agreed-upon changes had been implemented.

UGI Gas holds two annual collaborative meetings to provide stakeholders with the opportunity to discuss the collectively-managed Universal Service and Energy Conservation Plan

(“USECP”) of UGI Gas, UGI Utilities, Inc. – Electric Division, UGI Central Penn Gas, Inc. and UGI Penn Natural Gas, Inc. (collectively the “UGI Distribution Companies”). Due to the overlap in subject matter and interested parties, UGI Gas addressed the Settlement Items in conjunction with its annual USECP review at two meetings held on December 7, 2016 and December 12, 2016. UGI Gas invited to these meetings the parties to the UGI Gas rate case, along with the staff of the Commission’s Bureau of Consumer Services.

UGI Gas certifies that the Settlement Items have been implemented in accordance with the Settlement and herein provides an overview of the settlement items and their implementation.

## **II. SETTLEMENT ITEMS**

UGI Gas has implemented the following Settlement Items:

1. UGI Gas Increased the funding of the UGI Gas LIURP budget by \$185,900 as of January 1, 2017. *See* Final Order, at Ordering Paragraph 34.

2. UGI Gas revised UGI Gas Tariff Rule 9.1(b) to state that “UGI Gas will use financial information from the customer provided within the most recent twelve (12) month period to determine if a customer exceeds the 250% federal poverty level threshold.” UGI Gas also clarified that it does not require customer information to verify income if the customer has established income verification through receipt of Low-Income Home Energy Assistance Program (“LIHEAP”) within the past 12 months or if the customer is currently participating in CAP. *See* Final Order, at Ordering Paragraph 35.

3. UGI Gas has been encouraging Community Based Organizations (“CBOs”) to conduct additional outreach to CAP customers. This item was included for discussion in the USECP collaborative meetings and UGI Gas is considering changes to its next

triannual USECP to take effect on January 1, 2018, such as additional compensation to incentivize customer participation in CAP. *See* Final Order, at Ordering Paragraph 36.

4. UGI Gas has revised its call center scripts to ensure that applicants and customers are informed of the opportunity for security deposit waivers for income-qualified households. To better identify customers eligible for low-income programs, UGI Gas now requests income information on the initial call to establish new service or restore previously terminated service. *See* Final Order, at Ordering Paragraphs 37 and 38.

5. UGI Gas has revised its reporting procedures to include the number of customers in default of their payment arrangements, but who are still active customers, in applicable reports to the Commission to make its reporting consistent with industry standard. *See* Final Order, at Ordering Paragraph 39.

6. UGI Gas revised its training materials to clarify that it does not require a low-income customer to enroll in a Universal Service program to qualify for waiver of a security deposit, and that the only requirement is income verification. *See* Final Order, at Ordering Paragraph 40.

7. UGI Gas clarified its tariff language to reflect that annual income verifications are not required to establish eligibility for cold weather shutoff protection, and that annualized income is an acceptable method to establish winter shutoff protections. *See* Final Order, at Ordering Paragraph 41.

8. UGI has been consulting with CBOs and investigating the feasibility of using alternative communication means to process applications and verify income for purposes of security deposit waive and Universal Service programs enrollment. UGI Gas's CBOs were largely receptive to use of alternative communication means and UGI Gas intends to work with

its CBOs to incorporate alternative means of communication in its next triannual USECP filing. *See* Final Order, at Ordering Paragraph 42.

9. As agreed, UGI Gas has continued to use CBOs to assist in the implementation of its Universal Service programs.

10. UGI Gas has enhanced Spanish speaking customers' ability to understand the availability of programs by translating two, un-translated program documents into Spanish, and requiring the companies' CBOs to have access to Spanish language interpretation services if 5% or more of the residents in the portion of the service territory serviced by the CBO speak Spanish based on US census data. *See* Final Order, at Ordering Paragraph 43.

11. UGI Gas revised its identification policy to provide that before initiating service, an applicant must provide: (1) one valid government issued photo identification; (2) two valid alternative forms of identification (one of which must include a photo of the individual) if a government issued photo identification is unavailable; or (3) the applicant's Social Security Number. The term "government issued photo identification" was revised in UGI Gas's policies to include photo identifications issued by foreign governments. *See* Final Order, at Ordering Paragraph 44.

12. UGI Gas has clarified its medical certificate procedures to reflect its current practice of faxing the medical certificate form directly to a physician's office when provided the fax number by the customer. *See* Final Order, at Ordering Paragraph 45.

13. UGI Gas clarified in its procedures that the medical certificate form is not the only means of obtaining a medical certificate and that they will accept any writing that contains the information required by 66 Pa. C.S. Chapter 14 and 52 Pa. Code Chapter 56. *See* Final Order, at Ordering Paragraph 46.

14. UGI Gas revised its Protection From Abuse (“PFA”) procedures and policy language to clarify that the protections apply to PFA plaintiff applicants or customers as well as those subject to a court order providing clear evidence of domestic violence against the applicant or customer if issued by a court of competent jurisdiction in the Commonwealth of Pennsylvania. *See* Final Order, at Ordering Paragraphs 47 and 49.

15. UGI Gas updated its PFA training documents to clarify that PFA policies are not only applicable to traditional husband-wife spousal relationships. *See* Final Order, at Ordering Paragraph 48.

16. Customer service personnel of UGI Gas received on-site training by the Pennsylvania Coalition Against Domestic Violence. *See* Final Order, at Ordering Paragraphs 50.

17. UGI Gas clarified its procedures to reflect that the receipt of a valid PFA prevents a balance transfer into the name of the PFA holder unless that PFA holder is the customer. *See* Final Order, at Ordering Paragraph 51.

18. The design of UGI Gas’s customer information system, to be implemented in the fall of 2017, will accommodate a change to UGI Gas’s policies whereby a balance accrued jointly in a PFA plaintiff and third-party’s name will be assigned and billed first to the third party and only after 90 days of unsuccessful collection attempts will UGI Gas attempt collection from the PFA plaintiff. *See* Final Order, at Ordering Paragraph 52.

19. UGI Gas has modified its PFA handling procedures to further ensure the confidentiality of PFA information. *See* Final Order, at Ordering Paragraph 53.

### **III. CONCLUSION**

In summary, UGI Gas has met the obligations set forth in paragraphs 46-68 of the settlement of its 2016 base rate proceeding by implementation of the above Settlement Items.

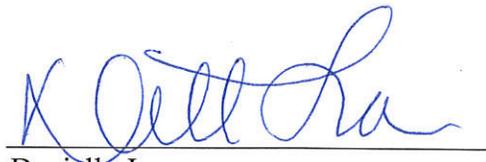




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