CUSTOMER **R**ESPONSE **C**ENTER TRAINING

MODULE 4
BILL EXPLANATIONS AND BILL CORRECTIONS
CHOICE PROGRAMS

==========

TABLE OF CONTENTS

DEFINITIONS	**2**
ACCOUNT CLASS DESCRIPTIONS	**3-5**
CCF / MCF / BTU / THERM	**6**
TERMS USED ON GAS BILL	**7**
HIGH BILLS	**8-10**
DEGREE DAY/BASELOAD/ESTIMATED BILLS	**11**
BILL CORRECTIONS	**12-17**
COMBINED & DUAL BILLING	**19**
SPECIAL METER CONDITIONS	**20-21**
INTRODUCTION TO CHOICE/MARKETER PROGRAMS	**22-29**
ONLINE ACCOUNT SERVICES	**30-38**
WAIVE LATE PAYMENT CHARGE (LPC)	**39-41**

DEFINITIONS

CUSTOMER TYPE

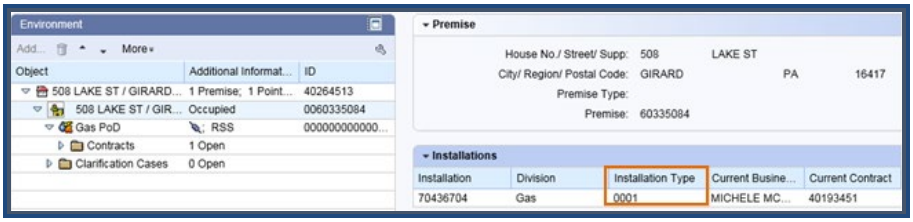
The Customer type will be determined during the initial creation of the Business Partner, once saved, this information cannot be changed. This information will be displayed as a picture next to the Customer name on the Identification screen under the heading “Business Master Data”. The two types of Customers are:

- Person: 
- Organization: 

INSTALLATION TYPE

The Installation type will simply tell if the account is heating or non-heating. This information can be found on the **Premise Overview** under the heading “Installations”. The two Installation types are:

- 0001: Heating
- 0002: Non-Heating



PRODUCT (RATE CATEGORY)

- SC01: Residential
- C_SC03: Commercial
- I_SC03: Industrial

ACCOUNT CLASS

The Account Class determines the Dunning process the account will follow. The Account Class will be determined during the Move In or Transfer Process. Once the account is active, this information can be found on the **Business Agreement Overview** in the “Account Class” field under the heading “General Data”. The nine types of Account Classes for NY are:

- Multiple Dwelling NY
  - 3 or 4 units – Residential Multiple Dwelling
  - 5 or more – Commercial Multiple Dwelling
- Resident NY (NYRS)
- 2 Family Dwelling NY
- Commercial NY (NYCM)
- Industrial NY (NYIN)
- Public Authority NY
- Healthcare Facility NY
- Public Authority Housing NY
- Marketer

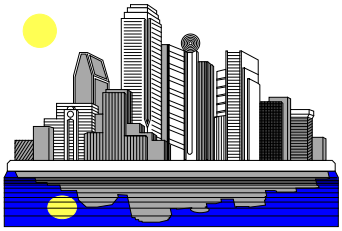
ACCOUNT CLASS DESCRIPTIONS



RESIDENTIAL

This classification includes revenues from gas supplied for residential purposes.
Examples:

- Private dwelling
- Apartment house with a single meter supplying four or less family units
- Separately metered apartments of a multiple dwelling
- Any combination of business and residence where the residential portion is greater than 50 percent.



COMMERCIAL

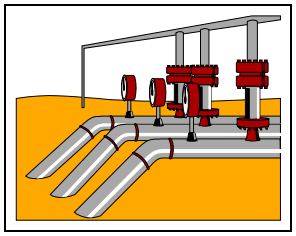
DEFINITION OF A COMMERCIAL CUSTOMER:

A commercial customer shall be defined as a customer using gas in: wholesale or retail trade, agriculture, forestry, fisheries, transportation, communications, sanitary services, finance, insurance, real estate, and services such as clubs, hotels, auto repair, etc.

The nature of the customer's primary usage or economic activity at the location of service determines the customer classification.

- Accessory buildings to dwellings such as garages or barns not used as actual living space.
- Any combination of business and residence where the commercial portion is 51% or greater.
- Institutions supported by funds raised by voluntary subscriptions (as Volunteer Fire Stations, some libraries, hospitals, etc.).

  Examples: charitable institutions, banks, building contractors, doctor's offices, nonprofit organizations, warehouses



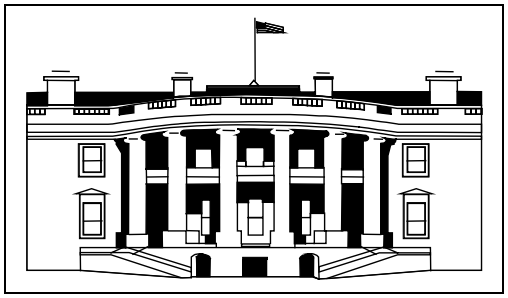
INDUSTRIAL

This account shall include revenues from gas sold to customers engaged primarily in a process, which creates or changes raw or unfinished materials into another form or product including mining and manufacturing.

The size of the customer's volume of use is not a criterion for determining Industrial service. **The nature of the company's primary usage or economic activity at the location served determines the classification used**.

- If a manufacturing corporation has only a sales office, but no plant at a particular location, this is classified as **Commercial** service on the basis of primary activity.
- If, however, the sales office is part of a manufacturing plant, this is classified as **Industrial** service.

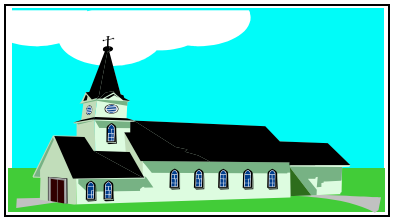
Examples: bottling works, cement plants, chemical plants, iron and steel plants



PUBLIC AUTHORITY

This account shall include revenues from sales of gas supplied to buildings, offices, and institutions occupied or operated by governmental agencies whose financial support are entirely public funds (raised through taxes).

Examples: city buildings, federal buildings, court houses, jails



RELIGIOUS

A religious customer shall be defined as a customer using gas in any properties owned by the religion. Examples: church schools, religious organizations

EXAMPLES OF REVENUE CLASSIFICATIONS

• Apartment Buildings	Residential, if master meter serves four (4) or less family units. Commercial, if master meter serves five (5) or more family units. Public Authority, if account is supported totally from public funds (e.g. taxes)
• Colleges	Commercial if private or Public Authority if University
• Dairies/Farms	Commercial, if portion of business is involved in the distribution of milk. Industrial, if primarily a milk plant producing milk and/or milk products
• Fire Stations	Commercial if Volunteer or Public Authority if Fully Funded
• Garages	Commercial if metered separately from living quarters
• Offices	Commercial, if goods or services are provided. Industrial, if gas load is for manufacturing or processing plant, with or without processing load, whether or not separately metered.
• Schools	Commercial if Private or Public Authority (if Public) - Religious (if owned by religious organizations)

CCF / MCF / BTU / THERM

There are a number of reasons why National Fuel bills customers using CCF.

- The gas from these sources may initially have varied heat contents, but when the gas enters our system we take steps to guarantee that it has at least 1,000 BTUs per cubic foot, as required by our PSC-approved tariff. Frequent testing is performed by both the PSC and National Fuel to confirm that this requirement is met.

- CCF/MCF/BTU/THERM Comparison
  - Compare CCFs (hundreds of cubic feet) to THERMS:
    - A THERM = 100,000 BTUs (British Thermal Units) of heat.
    - A cubic foot of gas = 1,000 BTUs of heat.
    - 100 cubic feet = 1 CCF
    - 100 cubic feet (1CCF) = a THERM.
    - 1 MCF = 10 CCF
    -

- A cubic foot is a measure of quantity of SPACE or VOLUME.

- A therm is a measure of quantity of HEAT ENERGY.
  Example: A customer billed for 360 CCF would equal 36 MCF OR 360 THERMS.

TERMS USED ON GAS BILL

Bill Payment
You can pay your bill by mail, Direct Pay, online or at our local offices. You can also pay at any authorized payment agent where there will likely be a processing fee assessed by the agent at the time of payment.

Billing Service Charge
Identifies and sets out the Company's cost of rendering your bill and providing account management services.

Budget Plan
National Fuel offers several flexible budget plans. The most popular plan allows you to spread your payments over 12 months. Another lets you spread your payments over 10 months (from September through June), and then, in July and August – months of typical lower usage – you would pay for the actual amount of gas used.

CCF
One hundred cubic feet of gas; a measure of quantity. One ccf will heat about 160 gallons of tap water to 130 degrees F – the average hot water temperature.

Customer Charge
Covers some of the costs that do not change based on the amount of gas you use. These costs include meter reading and line maintenance. The charge is billed to you whether or not you use any gas.

DAC (Delivery Adjustment Charge)
A charge that reflects the monthly changes (up or down) in the cost of reserve capacity and other Commission approved surcharges or credit.

Delivery Service Charges
The charges that relate to the delivery of natural gas on our system to your service address. This is the utility's regulated cost of doing business (with associated taxes) and applies no matter which natural gas supplier you choose.

Estimated Reading
Normally we try to read your meter every other month. We have estimated this reading because we were either unable to read the meter, or we were not scheduled to do so.

Gas Supply Charges
The charges for the natural gas product which is sold either in cubic feet or dekatherms.

Tariff Surcharge
The amount of allowed recovery by the Company of gross receipts taxes and corporate income tax.

Weather Normalization Adjustment
During the heating season, bills are adjusted (up or down) to reflect changes in actual weather levels. (Typically, Bills for October through May)

Online Services
You can set up automatic payments, view billing and payment history, sign up for budget billing and even submit meter readings.

Late Payment Charge
If the customer does not pay by the due date shown on the bill, we will add a late payment charge of 1.5% based on the unpaid balance.

Notice of Electronic Check Conversion
When you provide a check as payment, you authorize us either to use information from your check to make a one-time electronic fund transfer from your account or to process the payment as a check transaction. When we use information from your check to make an electronic fund transfer, funds may be withdrawn from your account as soon as the same day we receive your payment and you will not receive your check back from your financial institution.

Temporary State Assessment Surcharge
The Temporary State Assessment (TSA) Surcharge is a tax originally established by the State on April 7, 2009. On March 28, 2013, the State approved the extension of the TSA. TSA surcharges are remitted to the State and included in the State's general fund.

WHY IS MY BILL SO HIGH?

- Natural gas is a commodity that is purchased in a national marketplace where the forces of **SUPPLY & DEMAND** influence its cost.
    - Factors that influence **DEMAND**:
        - **Colder weather** – more natural gas used to supply heating equipment
        - **Electric utilities** are using natural gas more and more to generate electricity rather than coal (natural gas is a cleaner, more environmentally friendly fuel)
        - **Summer months** historically **were low demand times** for natural gas but now that electricity is being generated by natural gas, this may no longer be the case. The demand is higher to supply air conditioning (especially in the warmer areas of the United States).

- National Fuel Gas does not make a profit on the gas it supplies to its customers. Gas costs are passed along dollar-for-dollar and National Fuel cannot influence the price of the commodity.
    - The **cost of natural gas** is the part of our customers' bills that **National Fuel cannot control**
        - ✓ National Fuel's purchasing strategy is monitored by New York State Public Service Commission
        - ✓ Neither National Fuel nor the Public Service Commission has control over the amount **Marketers** charge for commodity. The customer must contact their Marketer for questions on costs.

WHY BILLS GO UP…AND DOWN

BILL CONDITIONS

- ☑ Season of the Year
- ☑ Longer Billing Period
  A 34 day bill is 13% longer than a 30 day bill
- ☑ Weather Extremes **1*
  Wind, velocity, temperatures, daylight variations
- ☑ Rate Increases
  - ☑ Degree Days **3*
- ☑ Weather Normalization **2*
- ☑ Actual or Estimated Read

***Notes:**

***1** Wind speed and the amount of daylight both attribute to the amount of fuel used. Sunshine creates radiant heat which lessens the need for fuel. Conversely, if we have a month without sun, gas consumption will be higher because of the lack of radiant heat.

***2** Rates for your natural gas service are approved by the Public Service Commission based on the expectations of normal weather.

***3** Degree days help us measure the severity of cold weather. The higher the number of degree days, the colder the winter.

***** Save 1% of your total heating bill for each degree you set back your thermostat for an 8-hour period. Set your thermostat back 5 degrees during each day while you're away and at night (two 8-hour periods per day) and you will save 10% on your annual heating bills.

CHANGES IN LIFESTYLES, ACTIVITIES

- ☑ Size of Family
- ☑ Average Age of Family
- ☑ Visitors
- ☑ Children Home From School
- ☑ Holiday Season
- ☑ Renovations
- ☑ New Babies
- ☑ Sickness, Convalescence
- ☑ Increase in Living Space
- ☑ Upper vs. Lower
- ☑ Vacancy



EQUIPMENT

- ☑ Additional Equipment
- ☑ Older Equipment
- ☑ Garage *(doors open?)*
- ☑ Inefficient Showerheads
- ☑ Cold Air Returns Open
- ☑ Windows *broken, storm windows?*
- ☑ Use of Oven Heat *(unsafe & wasteful)*
- ☑ Fireplace Damper Open
- ☑ Use of Fireplace
- ☑ Thermostat Setting
- ☑ Leaking Hot Water
- ☑ Hot Water Pipes Exposed to Cold Air
- ☑ New Hot Tub
- ☑ Gas Well
- ☑ Defective Equipment
- ☑ Clogged Furnace Filter
- ☑ Pool Heater Left On
- ☑ Hot Water Tank Set Too High

Things YOU CAN do:

-Use empathy with our customers. (Our gas bills are high too!)

-Review the premise meter reading history:
Is the current bill estimated?
Can we get a customer read or issue a verify read?
Does there appear to be a bad reading for which we are now having to compensate?

-Offer to send a read document so customers can call in or go online to record readings, avoiding estimated bills.

-Offer to enroll on budget billing to help them combat their high winter bills

- **Issue a High Bill Investigation only if** it is warranted. This should only be done in rare circumstances as a last resort. Always try to get a customer reading and/or a verify read first. These orders can be a waste of company resources if they are issued unnecessarily.

-Make suggestions on how to lower gas usage:

- Lower the thermostat (be mindful of elderly and possible hypothermia)
- Maintain heating equipment: use qualified heating contractor to be sure furnace is working safely & efficiently (can refer to CIP Savings Card)
- Change furnace filter periodically
- Close fireplace dampers when fireplace not in use
- Use fireplaces only occasionally as they are not an efficient source of heat
- Use storm windows or "Window Kits" to lessen heat loss
- Be sure to caulk around windows & doors
- Be sure there are no drippy hot water faucets

Helpful tips to use when discussing a customer's bill:

- The bigger the difference between the temperature outside and the thermostat setting inside, the harder your heating system will work and the more energy it will use, **even if you don't turn the thermostat higher**. More energy translates into higher bills.
- Your Miscellaneous Info packet includes Energy Efficiency Tips and Energy Saving Tips handouts. This is the same info that is found on the CIP website.
- Refer to Daily Average Temperature under the Usage History bar graph on the bill. (This year 20 degrees vs. last year 27 degrees)

Most importantly: Show concern and interest in the call. Make sure the customers feel that their concerns are being heard.

This may be your 100th time hearing the same concerns, but this may be your customer's first time calling!

DEGREE DAY FACTORS

BACKGROUND

A. Almost without exception, residential accounts are read every other month. Estimated bills are prepared on the alternate months and on the scheduled reading months when our meter reader does not have access to the meter. There are three components necessary to develop an estimated bill:

1. Degree Day Factor – This represents the amount of heating required, if any.

2. Base Load – This represents the non-heating requirement, such as hot water, cooking, clothes drying, or depending on the household, any combination thereof. This can be determined by totaling the consumption of a non-heating period, then dividing by two. Use the two lowest consecutive degree day billing months. These may be July/August depending upon weather.

3. Degree Days – Degree days per billing period. This helps us measure the severity of cold weather. The higher number of degree days, the colder the weather

B. Each residential account has its personalized degree day factor and base load information which is periodically reviewed and refined to reflect changes in gas consumption, as a result of room additions, additional conservation practices, etc.

METER READINGS GIVEN BY CUSTOMERS

Any customer reading called in will simply be taken into account to give the customer an estimated reading for any bill that we do not get a company reading for. Even if a customer calls in their reading for a month where we do not get a company reading, they will still receive an estimated bill, however, since their reading was recorded and taken into account, the estimated reading they receive should be close to what they called in.

ESTIMATED BILLS BASED ON CUSTOMER READINGS

When a customer calls in a reading on a month that NFG is not scheduled to read the meter, the system will factor that reading in and generate an estimated reading to be used for billing. The read is used to estimate the bill on the billing date.

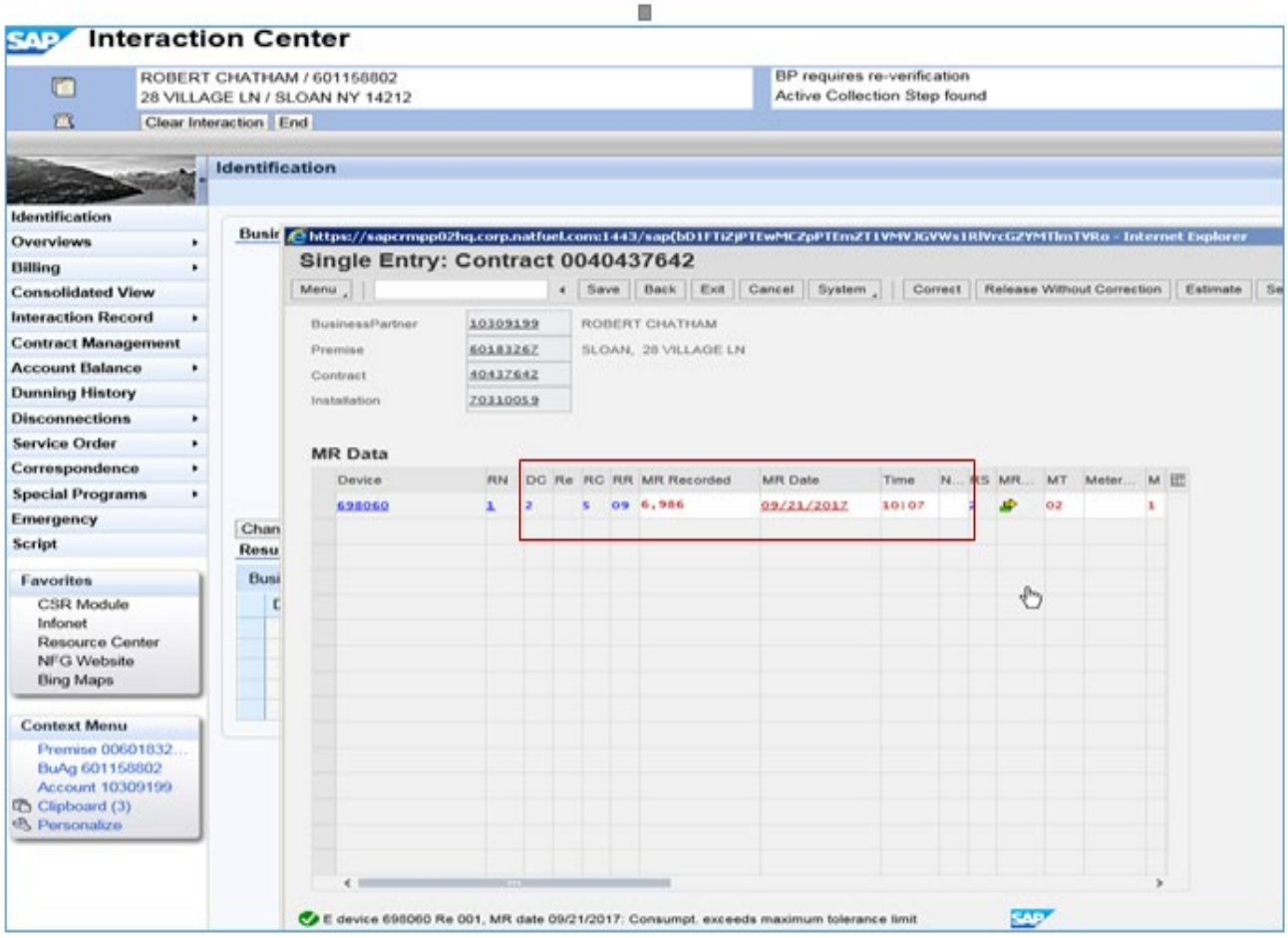
If a reading is submitted on the exact meter reading date for that portion, the customers EXACT reading will be used for billing, but it will show as estimated on the bill.

PROCESSING A BILL CORRECTION

Entering Customer Readings

When entering a customer reading, please watch for an error message after hitting “save”. If an error message appears, the reading does not fall in line (see example below).

Do not enter readings that don’t make sense-just record them in the IR.



If the reading does not fall in line, verify the meter number to ensure they are reading the correct meter. Also ask the customer:

- Exactly where each hand is pointing on each dial
- If there is any reason for a change in usage (is it now vacant?)

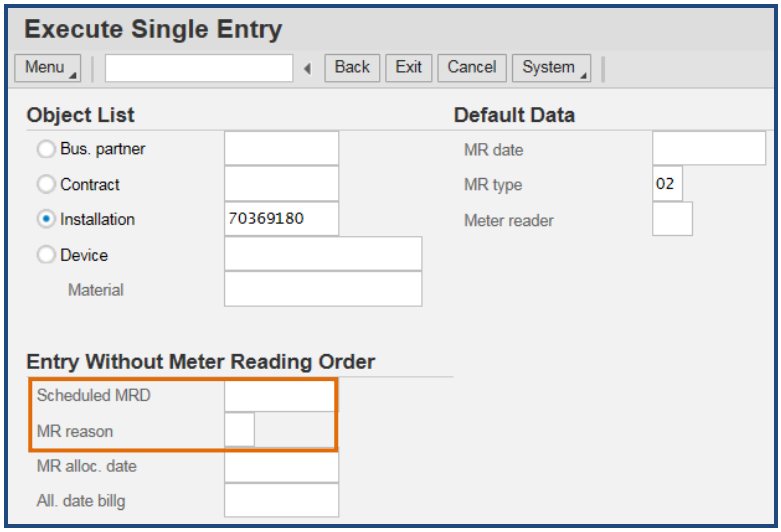
If the customer verifies the dial positions:

- Click on the “Save” button to save the reading
- Add a note in the IR with the reading and that you verified the dial’s positions.

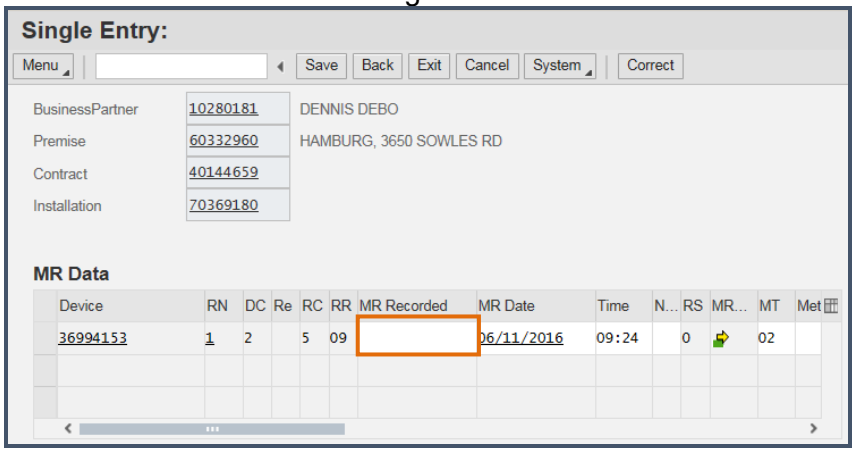
If the customer is unable to verify the reading while on the phone, give instructions on how to read the meter (e.g. when the dial is between two numbers it will fall to the lower, etc.) and ask they call back when they are able to confirm. In this case, advise the customer we will we not record the reading. Make sure you add the meter read to your Interaction Record and note that the customer will call back.

Always check to see when the last company reading was before scheduling a Verify Order. If the account is NOCO/Non-Read, try and see if the customer will be available to let us confirm the reading and to check the equipment.

1. The meter reading for the bill correction must first be entered through **Billing** > **Meter Reading Entry**
    a) Under "Entry Without Meter Reading Order", enter the date the reading was taken in the "Scheduled MRD" field and enter "09" in the "MR reason" field



    b) Hit "Enter" to go to the meter reading entry screen
    c) Enter the new customer reading under "MR Recorded" and click "Save"



    d) If you get an error saying "Consumpt. exceeds maximum tolerance limit" and you have verified with the customer that the reading is correct AND you are able to do the correction at this time, click "Save" to record the reading

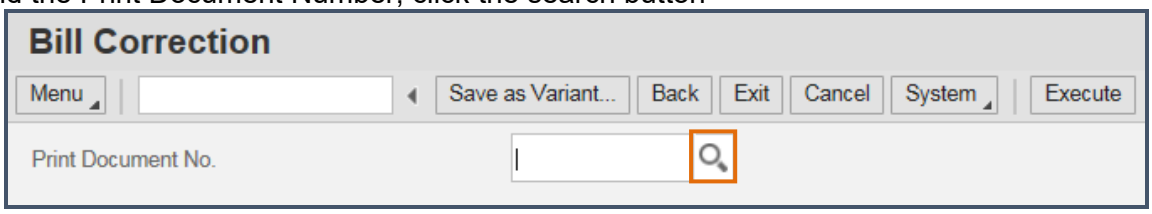
Before you process the bill correction, check and see if the customer is on budget billing or an installment plan. If so, do not do the adjustment. The implausible reading will hit a report and a book keeper will do the adjustment. The IP will be re-keyed and BBP amount will be adjusted if needed. Also do not process an adjustment if it changes someone's final bill amount, or if it's for more than just a few months. Bookkeeping will handle that instead.

2. If a Bill Correction is recommended, first go to **Billing** > **Premise Meter Reading History** to find the last company reading to adjust back to

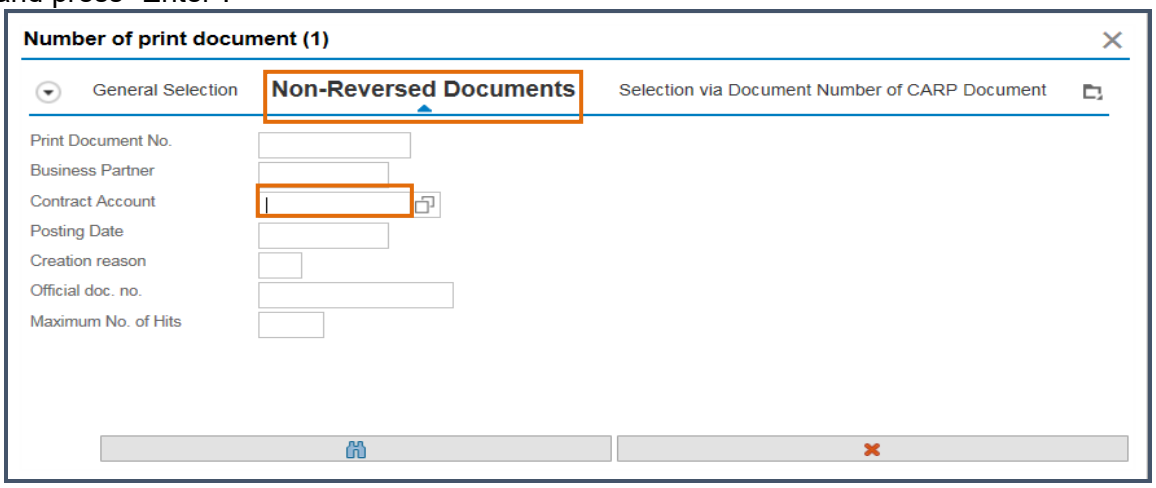
Contract	Status	Device	Register Type	MR Reason	MR Date	MR Result	MR Unit	MR Type	MR Note	Consumption
40458197		302567		09	06/01/2016	1,052	CCF	Customer: Web		2.000000000
40458197		302567		01	05/31/2016	1,050	CCF	Automatic estimation - SAP		50.000000000
40458197		302567		01	04/28/2016	1,000	CCF	Meter reading by customer -...		68.000000000
40458197		302567		01	03/28/2016	932	CCF	Automatic estimation - SAP		81.000000000
40458197		302567		01	02/25/2016	851	CCF	Meter reading by utility - SAP		110.000000000
40458197		302567		01	01/26/2016	741	CCF	Meter reading by customer -...		99.000000000
40458197		302567		01	12/28/2015	642	CCF	Automatic estimation - SAP		93.000000000
40458197		302567		01	11/20/2015	549	CCF	Automatic estimation - SAP		53.000000000

Back 1 2 Forward

3. Then go to **Billing** > **Bill Correction**
4. To find the Print Document Number, click the search button



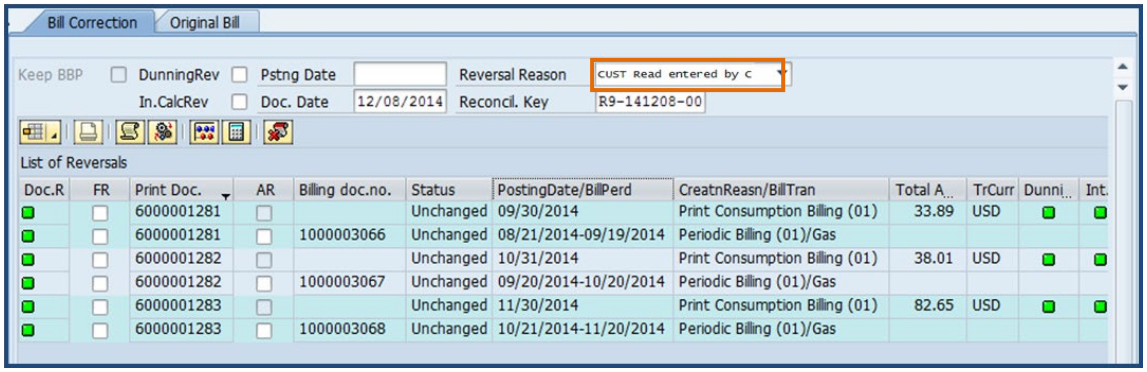
5. Click the "Non-Reversed Documents" tab, then enter account number in the "Contract Account" field and press "Enter".



6. From the list, double click the OLDEST bill that you want to actually correct

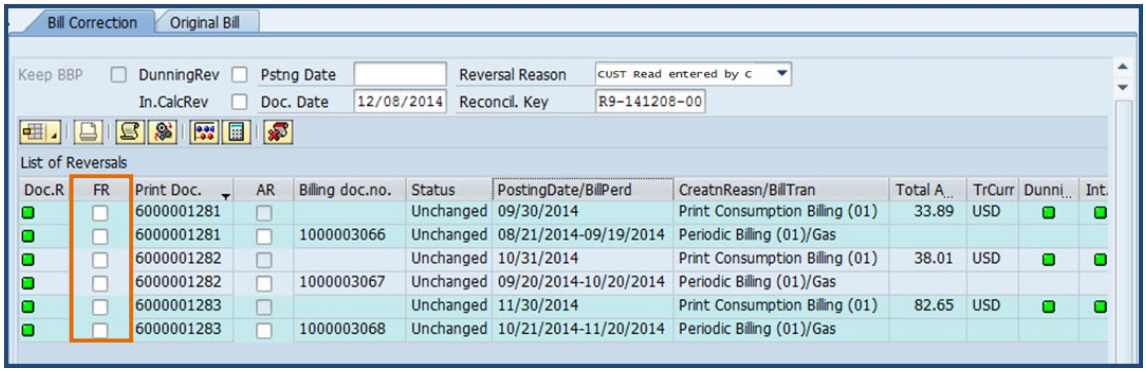
7. Once the "Print Document No." field is populated, click "Execute"

8. On the next screen, enter the required information before doing the correction
    a) Posting Date - today's date
    b) Document Date - the next business day
    c) Reversal Reason



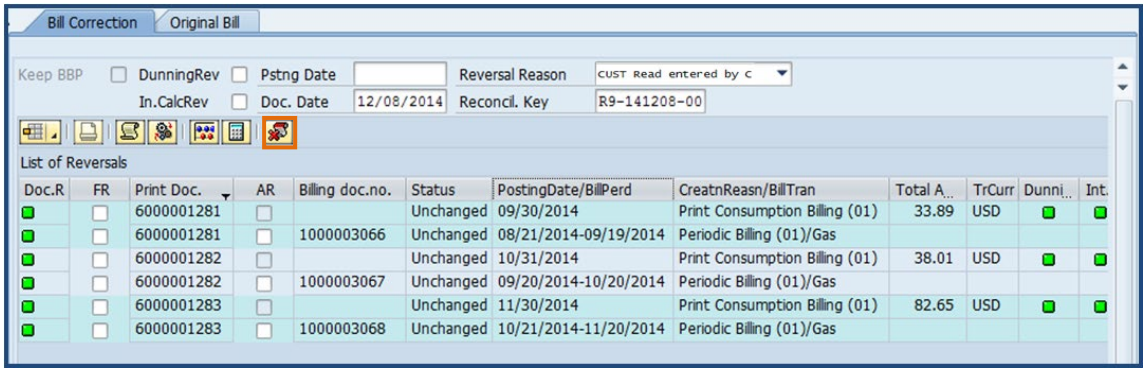
Doc.R	FR	Print Doc.	AR	Billing doc.no.	Status	PostingDate/BillPerd	CreatnReasn/BillTran	Total A...	TrCurr	Dunni...	Int.
		6000001281			Unchanged	09/30/2014	Print Consumption Billing (01)	33.89	USD		
		6000001281		1000003066	Unchanged	08/21/2014-09/19/2014	Periodic Billing (01)/Gas				
		6000001282			Unchanged	10/31/2014	Print Consumption Billing (01)	38.01	USD		
		6000001282		1000003067	Unchanged	09/20/2014-10/20/2014	Periodic Billing (01)/Gas				
		6000001283			Unchanged	11/30/2014	Print Consumption Billing (01)	82.65	USD		
		6000001283		1000003068	Unchanged	10/21/2014-11/20/2014	Periodic Billing (01)/Gas				

9. Under "List of Reversals", click the first box in the "FR" (Full Reversal) column and it will automatically select all other lines for the bills after that selection



Doc.R	FR	Print Doc.	AR	Billing doc.no.	Status	PostingDate/BillPerd	CreatnReasn/BillTran	Total A...	TrCurr	Dunni...	Int.
		6000001281			Unchanged	09/30/2014	Print Consumption Billing (01)	33.89	USD		
		6000001281		1000003066	Unchanged	08/21/2014-09/19/2014	Periodic Billing (01)/Gas				
		6000001282			Unchanged	10/31/2014	Print Consumption Billing (01)	38.01	USD		
		6000001282		1000003067	Unchanged	09/20/2014-10/20/2014	Periodic Billing (01)/Gas				
		6000001283			Unchanged	11/30/2014	Print Consumption Billing (01)	82.65	USD		
		6000001283		1000003068	Unchanged	10/21/2014-11/20/2014	Periodic Billing (01)/Gas				

10. Click the "Reverse" button (red "X") and the status of those bills will change from "Unchanged" to "Reversed" and will all turn red.



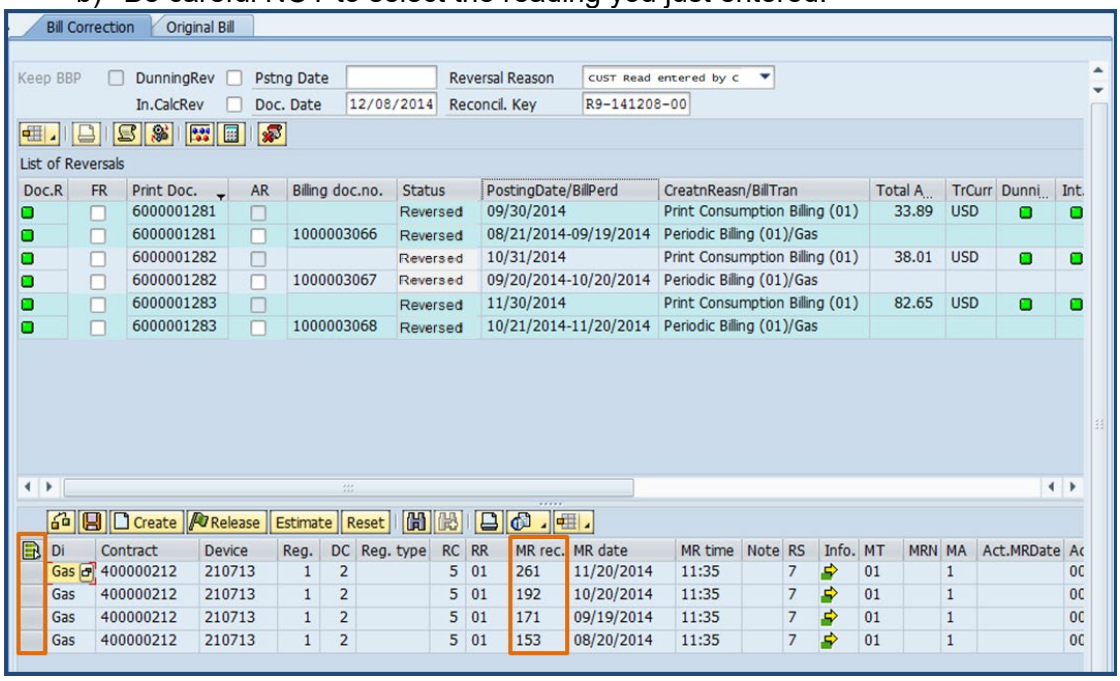
Doc.R	FR	Print Doc.	AR	Billing doc.no.	Status	PostingDate/BillPerd	CreatnReasn/BillTran	Total A...	TrCurr	Dunni...	Int.
		6000001281			Unchanged	09/30/2014	Print Consumption Billing (01)	33.89	USD		
		6000001281		1000003066	Unchanged	08/21/2014-09/19/2014	Periodic Billing (01)/Gas				
		6000001282			Unchanged	10/31/2014	Print Consumption Billing (01)	38.01	USD		
		6000001282		1000003067	Unchanged	09/20/2014-10/20/2014	Periodic Billing (01)/Gas				
		6000001283			Unchanged	11/30/2014	Print Consumption Billing (01)	82.65	USD		
		6000001283		1000003068	Unchanged	10/21/2014-11/20/2014	Periodic Billing (01)/Gas				

If unable to finish processing the Bill Correction because of an error, advise the caller that you have entered their reading and a correction will be done. When it's completed, a corrected bill will be sent out. Notate in IR what is needed and what you've completed.

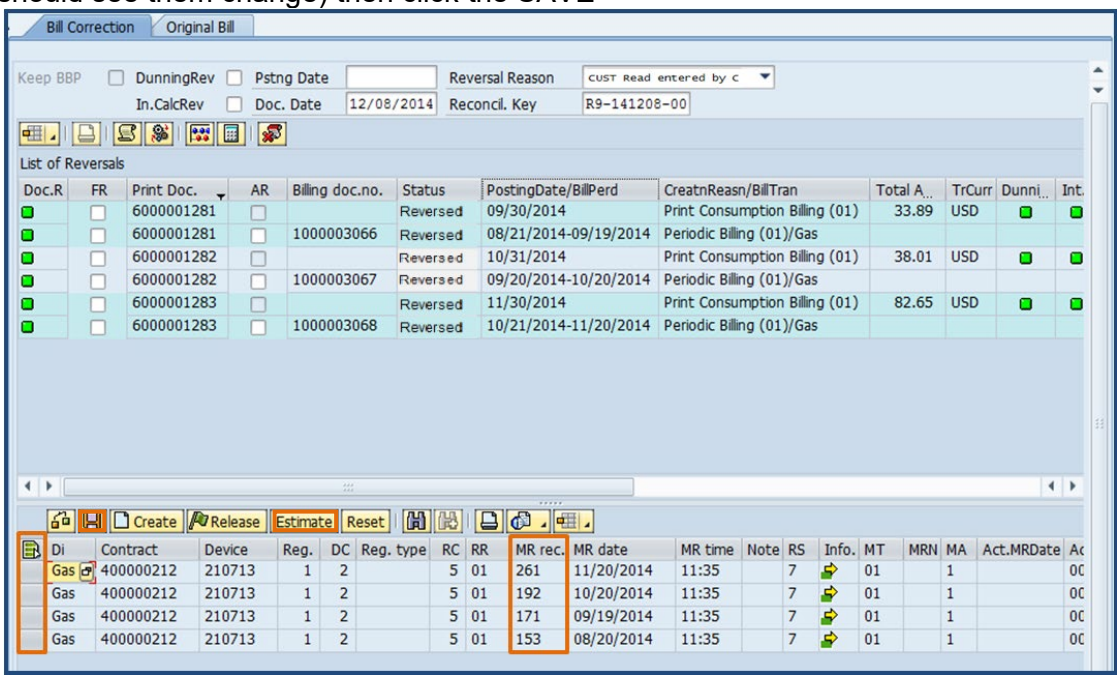
11. If the bills reverse successfully, click the "Display or Hide Meter Readings" button (gears)

12. End cap top reading (the one you just entered) > click release

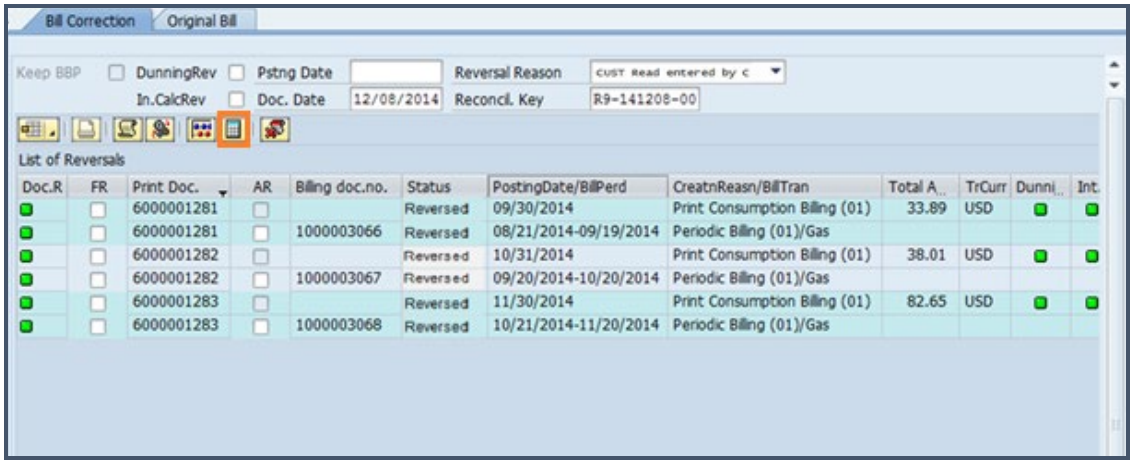
13. At the bottom of the screen, select the end cap of each meter reading that needs to be corrected (should be the readings that corresponded with all of the invoices you just reversed)
    a) Hold down the SHIFT button and click to select multiple lines at once
    b) Be careful NOT to select the reading you just entered.



14. Click “Estimate” to re-estimate those readings based on the new customer reading entered today (you should see them change) then click the SAVE



15. “Bill” button (calculator icon) and the status of the invoices will change from “Reversed” to “Rebilled”. Batch processing will re-bill the Customer overnight



a) The new balance due should display under Account Balance Overview

16. Exit out of the Back Office and create an Interaction Record of the meter reading given, the new balance, and how many invoices you corrected.

RE-ESTIMATION AFTER OVER-ESTIMATION

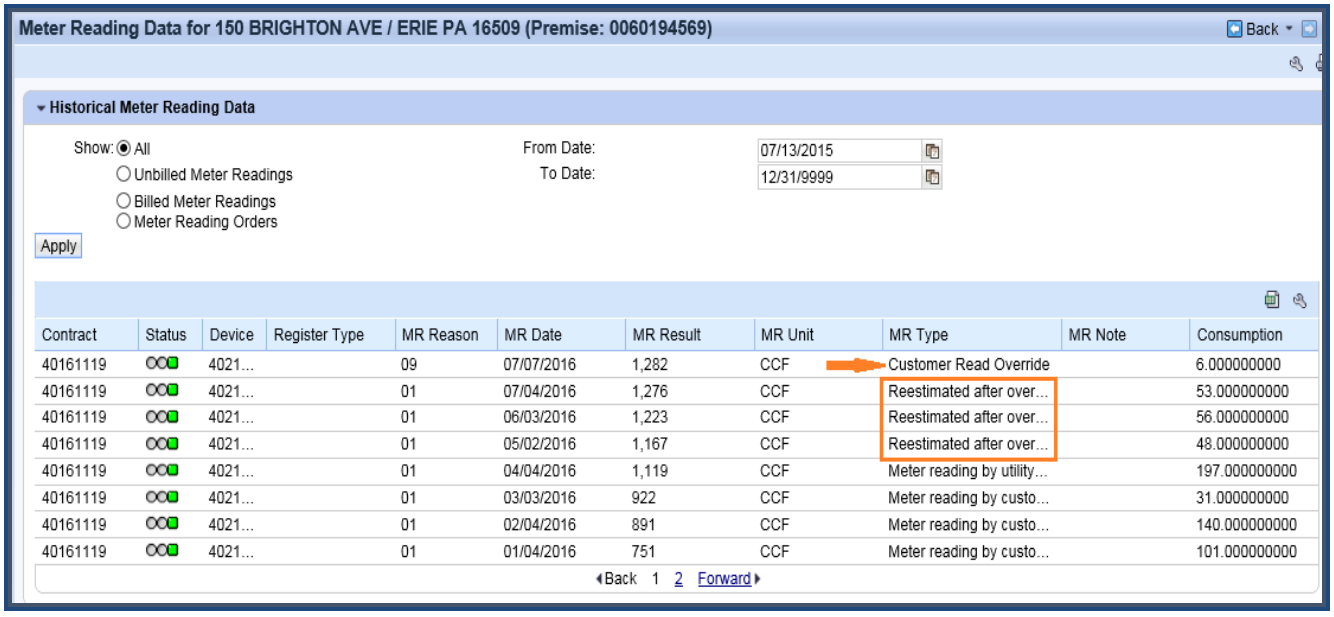
If the premise has had estimated meter readings posted, and an actual read is obtained (customer or company; can be for billing or an interim read) and this new reading is **lower** than the previous estimated reading, a system-generated correction of the readings and invoices will be made. This can correct up to 120 days of overestimated readings.

Note: For NMR: No Meter Read Accounts or NOCOs, if a verify read is scheduled, do NOT also enter a customer read. We want to wait for the company read to come through. Notate the customer reading in Interaction Records (we don't want the system re-billing based off of the customer read if a company reading is needed)

If the re-estimation happens immediately after the reading was saved, the customer will receive a corrected invoice the billing day after the re-estimation is completed.

EXAMPLE:

In the example below, a customer read was called in, verified, and entered. The system re-estimated the prior 3 months because the estimations were higher than the reading posted.



NOTE:

- When a Bill Correction results in a **large** credit/debit balance to any account (active or inactive), be sure to note the reason in the Interaction Record (i.e. vacant, over estimated, wrong reading, etc.) Without this information, the CAC would have to investigate for the reason of the adjustment resulting in the credit, before a refund can be issued.
- SAP will automate the creation of an adjusted bill increase letter when a CSR adjusts an account. A make up bill letter will be automatically sent when the net bill is increasing by at least 50% of the original value or when the net bill is increasing by at least $50.00.

When doing an adjustment for two or more months which results in an increase to the bills, you must place a Type 5 Lock/Hold on the account for 30 days.

COMBINED BILLING

Combined Billing is a term for a special type of Business Agreement that relates one billing account with two or more meters. Sometimes a Customer (especially a large commercial or industrial Business Partner) can have more than one meter "linked" to the same Business Agreement. These types of Business Agreements are called **Combined Billing Accounts**. National Fuel allows this type of account in **selected** situations where more than one meter is located on the same property. Basically, the usage for each meter is combined and billed together which results in a lower bill to the Business Partner, because they are billed for only one Basic Service Charge.

***Note** – we will no longer set up Combined Billing Accounts"

DUAL BILLING

Dual billing is a billing option that provides for separate bills to be sent to the Customer by the distribution utility (National Fuel) and ESCO ("Energy Services Company" i.e. marketer or supplier). The "Dual Billing" coding can be found on the Consolidated View

- A company reading is performed every month on this type of Dual Billing account and is billed every month based on the calendar month (ex: March 1st to March 31st).
- If the Customer requests a Bill Correction on the current month's bill due to an estimation, you may adjust the bill based on a Company or Customer Reading.
    - Do the adjustment **ONLY on the current month**.
- If you have any questions or are unsure about performing a Bill Correction, call the Transportation Department at ext. 7432 or email TSD-Billing@natfuel.com before doing any adjustment

Calls concerning Dual accounts should be handled by the phone representative. If a customer wants to discuss the **rates**, they may be referred to the Transportation Department. Announce the call. **DO NOT BLIND TRANSFER**. If they have a question on the commodity (supply) rate, they need to call their marketer.

SPECIAL METER CONDITIONS

SWITCHED METERS

- ✓ A switched meter is when one customer's meter is registering the gas that another customer is using, and vice versa. (example – upper and lower apts). This situation can happen when meters are relocated from inside the home to outside the home, or when an owner changes internal plumbing and reconnects the houselines to the incorrect meter, etc.

- ✓ This situation is usually identified when one of the services is shut off, whether it is for collection or by customer's request. We are made aware of the issue when the party that is without gas calls us to advise they have no service.

- ✓ A switched meter adjustment is completed by "switching the billing". The parties are billed using actual meter readings from the other party's meter. Any increase in billing, over the current 13-month period, is written off to "management decision". Because we used actual data (meter readings) for re-billing it is rare for additional monies to be written off.

- ✓ If a customer calls with a question regarding billing, please call Switched Meter Department

NON-REGISTERING METER

A non-registering meter is a meter that does not record all the gas which passed through it. Typically an account will show up with no usage or low usage. It may be necessary to send an order to investigate the drop in usage. Contact the Non-Registering Group for additional information or assistance. Do not issue any orders without checking with the Non-Registering Group first.

- ✓ New York State's HEFPA states when a meter fails to register the gas passing through it, utilities are permitted to back bill a customer 12 months (12 months plus the current month = 13 months) using prior consumption history. The adjustment may be for more than 13 months, however, the bill up amount for the time period over 13 months will be written off by using "management decision."

If a customer calls back and states they received a message about a possible Non Registering meter, there should be an Interaction Record on the account similar to the following:

> "IF CST CALLS, ASK WHAT EQUIPMENT IS CURRENTLY USING GAS. IF CUST IS USING GAS, SCHEDULE METER CHANGE ORDER WITH REMARKS: NON REG MTR; SEND BPEM WITH ORDER# TO NONREG GROUP. IF NOT USING GAS, PLS ASK IF WANTS TO PLACE LOCK ORDER TO STOP BILLING. SENT NR102 NO ACCESS LETTER AND LEFT MESSAGE"

If the customer states they are using gas, go to Service Order > Svc Order Create with Device, choose "Meter Change", and schedule an appointment with the customer. Make sure to note in the order remarks: "NON REGISTERING METER". Also make sure to create a "Non-Registering Meter" BPEM Case so the Non-Registering group can track these accounts. In the BPEM notes, be sure to note that you created the order and include the order number.

If the customer states they are not using gas, ask if they would like to end the account and stop the billing altogether. If they do, take a normal Move Out. If not, simply note the account that the customer is not using gas, but wants the account to remain active.

SHARED METER *(Applies to Residential customers only)*

Any residential utility meter that measures gas, electric or steam service used outside a tenant's dwelling. This could include heat and/or hot water provided to other areas such as another apartment, common area or separate room. A shared meter condition may also include a common hot water tank or heating equipment.

INVESTIGATION OF POSSIBLE SHARED METERS

- ✓ When a shared meter is reported or suspected, advise the tenant we must notify the owner of the possible condition. Request the owner's name and address and/or phone number. You must specify the shared condition and enter the information in an Interaction Record. Provide the information to the Shared Meter Group by creating a BPEM Case with Case Category "Shared Meter".
- ✓ Gas meter must be on and investigation must be requested by customer of record or property owner to initiate shared meter investigation.

NOTE: The NY State Shared Meter law is for residential accounts only. It does not apply to commercial accounts.

INVESTIGATION OF CORRECTED SHARED METERS

- ✓ Transfer the caller to the Shared Meter Department.
- ✓ If no answer, create a BPEM Case with Case Category "Shared Meter" with as much information as possible along with a contact phone number.
- ✓ The Shared Meter group will call the customer back and, if appropriate, issue a shared meter re-investigation order.

INTRODUCTION TO CHOICE/MARKETER PROGRAM

CHOICE / MARKETERS

The natural gas industry has undergone the process of deregulation.

This change was implemented in the hopes of replacing traditional regulated Utility service with a competitive retail marketplace. The Utility continues to provide delivery of natural gas through its pipeline system but customers are free to purchase their natural gas supply from a competitive supplier.

If the customer requests a list of suppliers, refer them to www.nationalfuelgas.com. From there, go to "For Home" and select "Choosing a Natural Gas Supplier."

When a customer is choosing a Natural Gas Supplier:
National Fuel representatives should remind customers that persons coming to their home on behalf of the Utility carry photo identification and:

- ✓ They will carry an identification card and will produce that ID without resistance if asked for it.
- ✓ National Fuel employees do NOT visit customers' homes to discuss account matters, to view a customer's gas bill or to ask them to sign any sort of agreement.

Ultimately, if the customer chooses to purchase their gas from another supplier:

- ✓ National Fuel will be notified of the customer's decision
- ✓ We will send the customer a letter confirming their intent to switch.
- ✓ Their account will be updated automatically
- ✓ Depending on the supplier, they may receive a separate bill for the gas supply from their new gas provider and a bill for the delivery service from National Fuel Gas.

HISTORICAL BILL RATE COMPARISON

National Fuel's Website has a tool available for Residential and Non-Residential customers to view their gas usage and cost for the past twelve months.

- ✓ This tool is helpful to customers in determining the amount they were charged per CCF so they can compare the cost when choosing a gas supplier.
- ✓ When customers ask the amount of their bills, or for their gas usage, direct them to use the online tool. They do not need to set up an online account in order to use the tool.
- ✓ If they do not have access to our website you may print and send the information to the customer.
- ✓ The comparison is not available for inactive accounts

To access the tool:

- Go to: www.nationalfuel.com
- Under the "Utility Column", click "Historical Bill Comparison"

Enter either:

- 9 digit Business Agreement number and zip code OR
- 7 digit Business Agreement number, zip code and last name

CHOICE / MARKETER – "REMAIN NEUTRAL" PROCESS

Whenever a discussion regarding a marketer takes place you must remember to:

- Remain neutral on all calls relating to marketers.
- Neither disparage nor promote any marketer.

As required by law and enforced by the Public Service Commission (PSC), the Utility does not make a profit on the gas it supplies to customers. Natural gas costs are passed along dollar for dollar to customers and are reflected under the "Gas Supply Charges" heading on customer's bill.

It's important for the customer to know that no matter who they choose to supply their natural gas, National Fuel Gas will be there to deliver the gas and National Fuel will continue to maintain the gas lines and meters. This includes responding to gas emergencies.

ACCOUNT IDENTIFICATION

The following indicators can be seen on the **Consolidated View** work center:

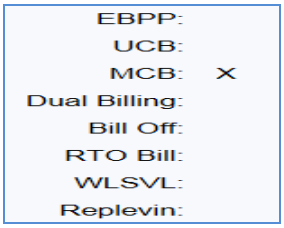
UCB (UTILITY CONSOLIDATED BILLING) ACCOUNTS

A UCB Account is where National Fuel sends the invoice for both the supply and delivery, regardless of whether NFG is the supplier or a Marketer is the supplier.

MCB (MARKETER CONSOLIDATED BILLING) ACCOUNTS

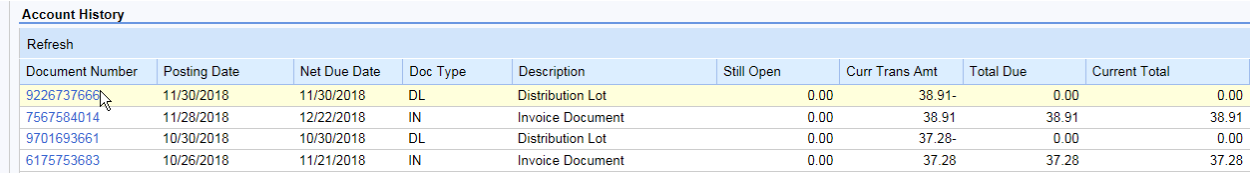
An MCB Account is where the supplier handles their own billing and payment processing. Advise the Customer that you do not have their bills available and that they should contact their Marketer. If the Customer is calling in a reading, record their reading and adjust if necessary. They should follow up with their Marketer as to the credit/debit due to the adjustment.

Check Consolidated View work center to identify an MCB customer



MCB Customers are billed the distribution charges and this will show in ICWeb as an invoice (see screenshot below)

- Account Balance Overview and Account History will show this amount as owing
- However, the customer does not owe NFG this amount, they should pay their marketer



Document Number	Posting Date	Net Due Date	Doc Type	Description	Still Open	Curr Trans Amt	Total Due	Current Total
9226737666	11/30/2018	11/30/2018	DL	Distribution Lot	0.00	38.91-	0.00	0.00
7567584014	11/28/2018	12/22/2018	IN	Invoice Document	0.00	38.91	38.91	38.91
9701693661	10/30/2018	10/30/2018	DL	Distribution Lot	0.00	37.28-	0.00	0.00
6175753683	10/26/2018	11/21/2018	IN	Invoice Document	0.00	37.28	37.28	37.28

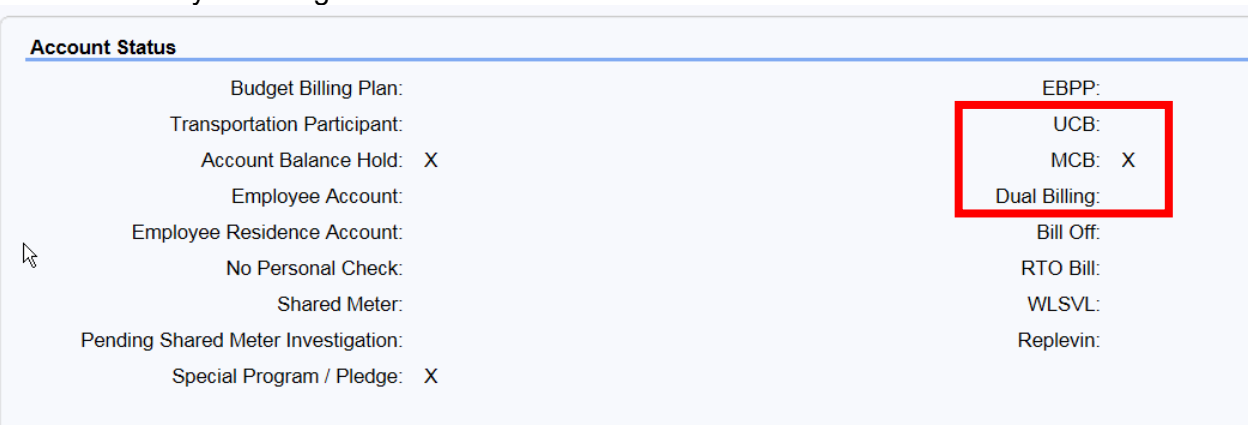
A program will run twice a month to pay these invoices; these payments will also show in ICWeb

- This will show in ICWeb as a "payment lot" (see above)
- This bills the marketer the amount of the invoice
- The customer did not actually pay this amount as it was just the amount being billed to the marketer and the customer needs to contact their marketer to inquire/pay the amount.

If the customer does pay on their NFG account, NFG would refund the payment back to the customer and the customer will still need to pay their marketer.

MCB Customers cannot enroll in budget billing. They would need to contact their marketer to do this. We are not able to tell what the budget amount would be. We also do not process collection activity for MCB accounts since we do not do the billing.

Start all calls by checking consolidated view to see if customer is with a Marketer



MCB—customer receives bill from their marketer for supply and delivery charges
UCB—customer receives bill from National Fuel, we use the marketers rates to bill the customer
DUAL—customer receives a bill from National Fuel for the delivery charges and a separate bill from their marketer for the supply charges

If customer is MCB do not advise them any dollar amounts- amounts shown on the account are ONLY the delivery charges- please have them contact their marketer to see what they currently owe

If the account is MCB and it is showing a past due balance, this is an amount that is owed to National Fuel from prior to the customer being MCB

If there are any questions on whether an MCB customer owes a balance please contact the transportation line at ext. 7432—do not transfer the customer to this line

Marketer Switches for HEAP/SLIP Accounts per Public Service Commission (PSC) Order

Marketers **with** a waiver are allowed to enroll accounts coded HEAP/SLIP. They also are not required to drop HEAP/SLIP customers.

The only marketer that currently has a waiver is New Wave Energy.

Marketers **without** waivers are **not allowed** to enroll accounts coded HEAP/SLIP.

CUSTOMER "CHOICE" INFORMATION

The commodity cost (cost of gas) may vary from marketer to marketer. The customer will have to research this and make their own decision as to which marketer is offering them the best price.

National Fuel Resources is a separate natural gas supplier and marketing company.

Complaints, questions or disagreements should be taken up directly with the marketer. However, if the customer cannot resolve the matter with their marketer they can request assistance from the following:

NY Attorney General
1-800-771-7755
www.oag.state.ny.us

NY Public Service Commission (ESCO Complaints)
1-888-697-7728
www.dps.ny.gov

NY Consumer Protection Board
1-800-697-1220
www.nysconsumer.gov

Matters regarding their final bill from National Fuel or National Fuel payments or service related matters should come to National Fuel. Questions concerning marketer enrollment prior to leaving National Fuel, depending on the circumstances may be resolved by calling National Fuel. Gas safety-related questions, including leak reports, service and meter readings should be directed to National Fuel.

It is important that we remember we are hearing the information from the customer after the fact. People perceive same or similar information differently. Therefore, in dealing with the customer we must make every attempt to remain neutral. You can remind the customer that they are under no obligation to select an alternative supplier. They still have the option to purchase their gas from National Fuel.

A customer can switch back to NFG. However, marketers have their own purchase agreement (contract). Their contract with the marketer may restrict when they can switch back or impose fees for switching back before they have met their obligation to the marketer. Any questions customers may have regarding a marketer's contract or agreement should be taken up with the specific marketer.

Please remember to refer **any** marketer issues back to the specific marketer that the customer has questions about.

You are also not to give your personal opinion regarding a possible solution to any customers' situation with **any** marketer. This includes not endorsing **any** marketer, especially National Fuel Resources, or suggesting that the customer return to National Fuel.

CANCELLING AN ACTIVE MARKETER

If a customer who is already active with a Marketer requests to come back to National Fuel, advise that they would need to contact the Marketer directly to cancel. However, if the customer does not want to contact the Marketer to cancel, or the Marketer is unwilling to drop the customer, we need to process their request.

Advise they may be assessed fees by the Marketer and that we are not aware of what those charges are. Also, the customer would return to NFG once the current Marketer is canceled, not their previous Marketer (if there was one).

- In this scenario, create a BPEM Case (choose “Cancel Pending Enrollment” from the “Case Category” drop down) AND enter an Interaction Record using Reason code: “295 – MKTR SWITCH CANCEL”
- In the Notes, make it known that it's the customer's request for NFG to perform the manual drop and they do not wish to work with the Marketer to complete this process.

CHOICE BPEM CASES

REQUESTS TO RETURN TO CURRENT SUPPLIER

If a customer requests to return to National Fuel or current marketer on the day of billing, or already has been billed by the new marketer, advise the customer that:

- This may be possible and to contact their marketer
- Their marketer may assess an early release/cancellation fee
- If they were previously with another marketer, they will return to that marketer, not National Fuel

When a Customer calls to cancel the "pending" enrollment with their new marketer and they are within the eligible timeframe to do so: create a BPEM Case (choose "Cancel Pending Enrollment" from the "Case Category" drop down) AND enter an Interaction Record using Reason code: "295 – MARKETER SWITCH CANCEL". The "pending" enrollment can be canceled up until the day BEFORE the account is to be billed for the next scheduled billing cycle.

In the BPEM Case notes and Interaction Record, include:

1. The customer's name and who you are speaking with
2. Wants to stay with "*name of current*" marketer
3. Does not want to switch to "*name of new marketer*"

- When a customer calls regarding a "pending" marketer switch letter, if the Interaction Record shows they have already cancelled through their marketer, or if the Supply Scenario tab on the "Display Point of Delivery" Back Office screen shows that the Marketer will not become active, the marketer switch has already been canceled. **Do not create a BPEM Case.**
- If the enrollment is "active" (which means that it is past the next bill or day of billing) when the customer calls, it is too late for you to cancel enrollment. Advise the Customer they must call the marketer to cancel.
- If an account is "active" with a Marketer and the Marketer puts through a "drop", the account will come back to National Fuel

MARKETER (SUPPLIER) BLOCK

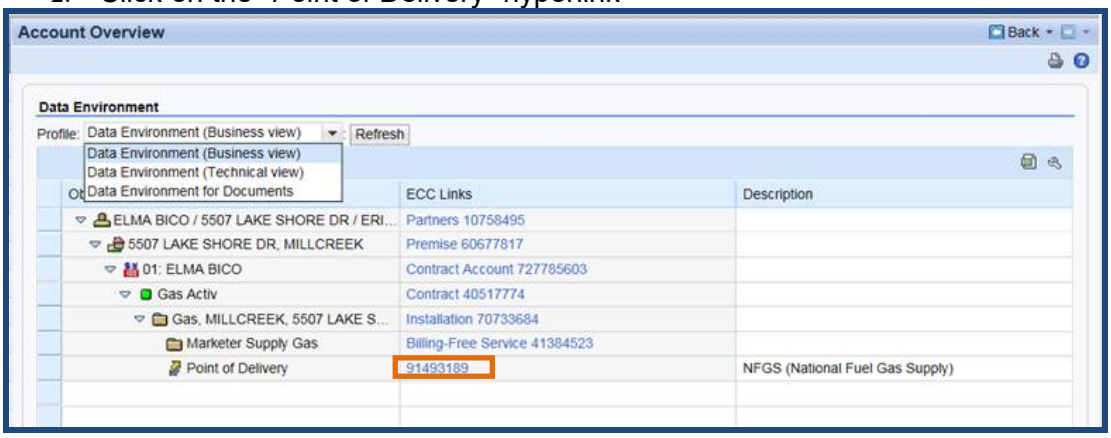
- If the **Customer states** (*cannot be suggested by NFG representative*) they would like their account to be blocked from any future enrollments with a marketer, create a BPEM Case.
  - In the "Case Category" drop down menu, select "Restrict/Un-restrict Marketer Enrollments"
  - The Transportation Services department will be notified of the Customer's request and update the account.
  - This "block" will prevent the account from switching from their "current" supplier (which can be National Fuel or a marketer) to another supplier. This procedure can be used regardless of whether you are canceling a pending enrollment.
  - In the future, if a Customer who has placed a "block" on their account changes their mind, create a BPEM Case for the Transportation Services department to have the block removed.

ENROLLMENT & DROP INFORMATION FOR MARKETER ACCOUNTS

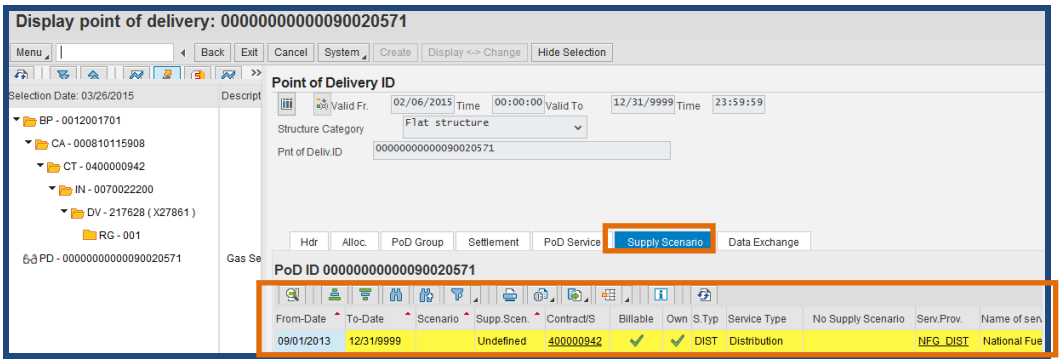
The NY Public Service Commission (PSC) Uniform Business Practices require a minimum of fifteen (15) days between the date a Customer enrolls with or drops a marketer and the date that same request takes effect. See the steps below to view marketer information.

<u>To see a list of all Marketer Information and Marketer History</u>:
<u>NOTE</u>: This will only show active and previous Marketer information. To see a pending Marketer switch, check the Notes History in the Interaction Record

1. Go to **Overviews** > **Data Environment Overview**
2. Click on the "Point of Delivery" hyperlink



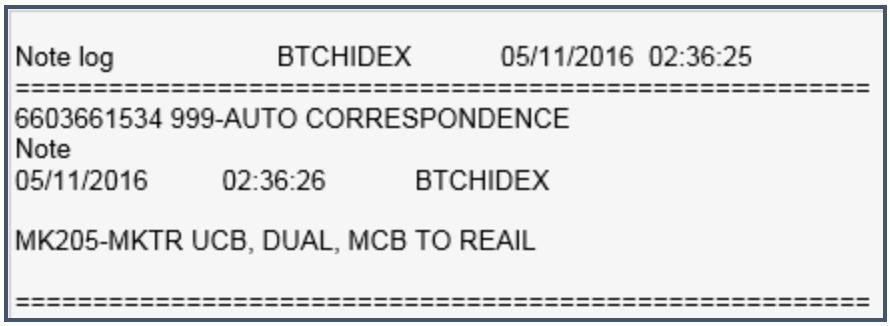
3. Select the "Supply Scenario" tab
    - Previous marketer history is visible from oldest to newest



- If the "To-Date" shows 12/31/9999, the Customer is currently with that supplier and if the customer wants to cancel with them, they would have to call that Marketer directly
- When a pending switch is canceled, the customer will remain with whatever supplier currently has a "To-Date" of 12/31/9999.
- If the account is not currently with a marketer (i.e. NFG DIST shows a "To-Date" of 12/31/9999 and there is no other active marketer listed, or all other marketers have "To-Dates" in the past) and the Customer cancels a 'pending marketer switch', they will stay with National Fuel.

- **NOTE:** The Customer will NEVER return to a marketer whose “To-Date” date is in the past. If the Customer decided they wanted to go back to one of those marketers, they would have to call them directly to sign back up.

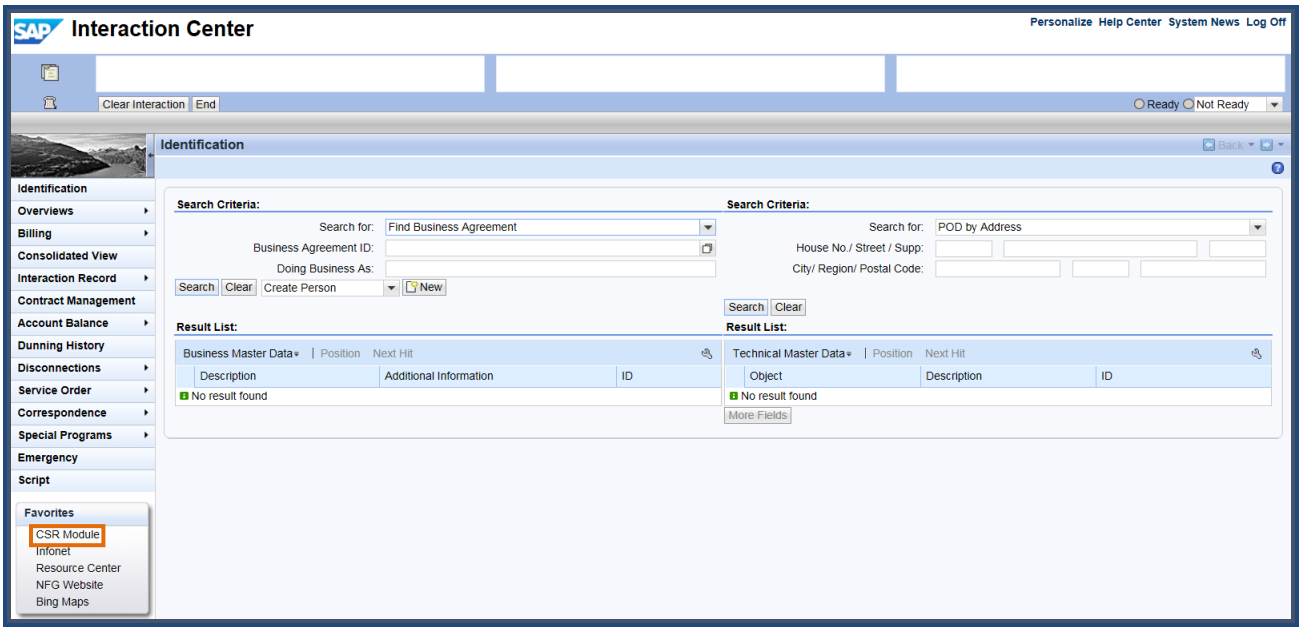
If an account is dropping a Marketer, you will see an Interaction Record similar to the one below:

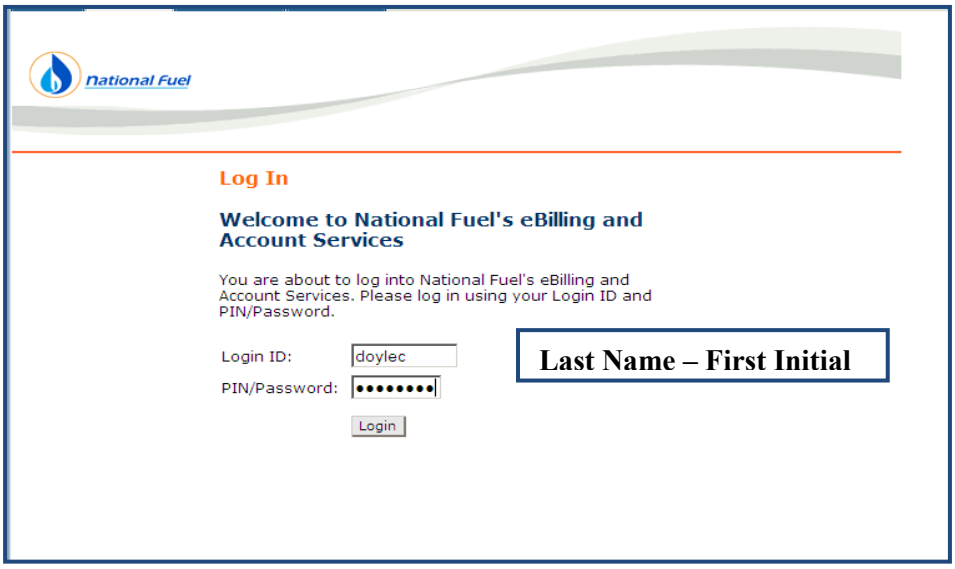


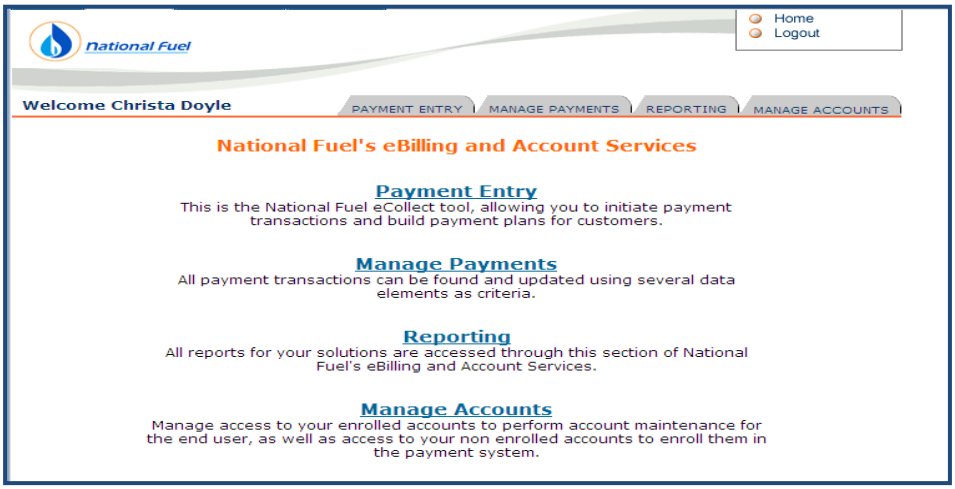
A Marketer enrolled account that:

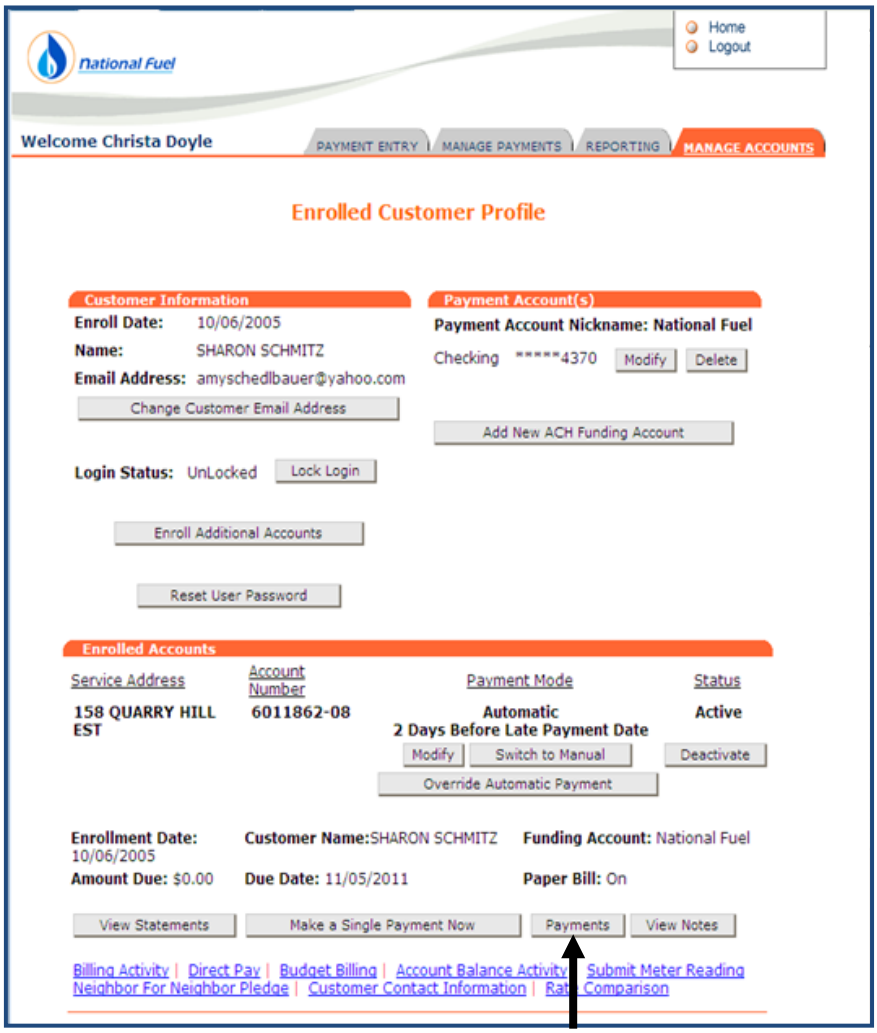
- Was shut off for non-payment will go back with the marketer if the customer is reconnected within 15 days after being Dunning disconnected
- Has a **Seasonal Move In** order completed will not automatically go back to the previous marketer since they will have a new Contract
- Is currently active with a marketer and they cancel with that marketer will return to NFG if there is no other pending marketer switch

INTRODUCTION TO ONLINE ACCOUNT SERVICES









“NO CHECK” CODE

- A customer who’s account is coded “No Check” **can**:
  - Pay with debit or credit card on National Fuel’s Website or with ORCC Online Resources Phone Payments
  - Pay with cash at a National Fuel CAC location
- A customer who’s account is coded “No Check” **cannot:**
  - Make “One-Time Payments” using a checking or savings account on National Fuel’s Website through online services.
  - Pay with check through Western Union
- Code will be activated for a Business Partner after the second return check bank’s fee is charged within a twelve month time frame.
- Code will remain with the Business Partner for 12 months after the second return check bank’s fee is posted on a returned payment.
  - If there is a “NO CHECK” code on an account, ORCC accepts debit or credit card payments.

NOTE: If a customer schedules an online payment in the future and in the meantime is coded “No Check” this payment will still be processed. The “No Check” code will only stop a customer, from that point on, from attempting to make a new online payment.

EBPP: **E**lectronic **B**ill **P**ayment/**P**resentment Enrolled Customer

When a customer has enrolled their account online, the account will be coded "EBPP". The customer will receive a confirmation email after clicking on the "enrollment confirmation" button. We must allow 24hrs for the account to be updated with this code from the time the customer enrolls.
EBPP customers can:

- Make on-line payments (It **does not** mean they have already made payments through the on-line service)
- View history of online payments
- View monthly billing statements
  - **It takes three (3) business days from the date the most recent billing statement was mailed to appear on-line.**
- Manage profile. The "Manage Profile" options are:
  - Billing accounts: Manage data related to your active Billing Accounts, add new Billing Accounts, and set up and manage automatic payments.
  - Payment accounts: Manage data related to your active Payment Accounts and add new Payment Accounts.
  - Personal information: Update logon and personal information.

- View billing activity information
- Enroll in Direct Pay
- Enroll in Budget billing plan
- View account balance activity information
- Submit meter reading
- Pledge to the Neighbor For Neighbor program
- Update contact information
- Viewing the rate comparison chart

Once an account is closed (contract ended and final billed), they cannot sign up for online services under that BuAg. However, a Business Partner who was already enrolled before the account went inactive can:

  - Pay their final bill online up to the due date
  - View their online account for 12 months <u>after</u> their business agreement ended. After 12 months, the business agreement number is automatically disenrolled.

NOTE: If an account is noted as Braille or large print bill, they will not be able to enroll in online services. In addition, the representative will not be able to view the bill statements online. See a floor supervisor if you need a copy of the statement.

Combined and MCB Accounts
<u>Combined</u> accounts may enroll in and make payments using Online Services. When enrolling, they must use the zip code for the first meter location listed.

<u>MCB</u> accounts are not eligible to enroll in or make payments through Online Services.

BILL STATEMENTS – ONLINE

A customer can view their bill statements online for up to the past 24 months by enrolling in our online services (EBPP). Once enrolled, they can use the "Billing Activity" option on the left-hand side of the screen for the monthly bills and the "Payment History" option for the pay history for up to 24 months.

"BILL OFF" INDICATOR

The accounts coded "BILL OFF" in Consolidated View **ONLY** get an electronic bill. If a customer states they didn't receive their bill, and the "BILL OFF" indicator is on their account, advise the customer that they will be receiving their bill through their email.

Final bills are emailed, just like regular bills, when the paper bill is off.

LETTERS SENT TO CUSTOMERS RESULTING FROM ONLINE ACTIONS

When an online action has taken place on their account, National Fuel will send a letter to the customer advising them of such. These online actions include:

- CSR Pending Payment Cancellation
- CSR Pending Payment Modification
- Bill Notification
- Enrollment Confirmation
- CSR Initiated Payment Confirmation (same code for Single/Multiple accounts)
- Returned Payment (NSF, Not Found, etc.)
- Bad Check Notification

WEB (ONLINE) PAYMENTS

All web payments are made through our web site (Nationalfuelgas.com). Customers can make payments from either Checking or Savings accounts, or with Credit and/or Debit cards.

INACTIVE - ORCC ONLINE PAYMENTS

- Inactive customers are never allowed to enroll on the website.
    - If the customer has a balance, they should be allowed pay as a one time pay.
    - Enrollments cancel when gas accounts become inactive.
    - Inactive accounts can make a one-time pay online or IVR only if owes a balance.
    - If the balance is inactivated, advise the customer that they must use the Business Agreement number, not the inactivated number, when making the payment.

USING CHECKING OR SAVINGS ACCOUNT ON THE WEB:

- No service fee for this type of payment transaction.
- If there is a "No Personal Check" code on an account, this method of payment is not accepted. Payment on the web must be made with either a debit or credit card.
- The system does not check to determine if there are sufficient funds in the bank account to cover the amount of the electronic checking/savings transaction. (ONLINE RESOURCES runs the bank account number against two (2) databases in order to determine if the checking/savings account has a history of returned payments. If the account is not listed in either of the databases, the payment is accepted.)
- Payments from Canadian Banks are not accepted.
- The maximum payment amount allowed is **$1,000 per transaction** or TDB, whichever is less.
    - When a customer wants to **pay more than $1000** by a checking account or savings account, they need to speak to a live rep. They will be required to make more than one transaction, and will be charged $1.00 per transaction.

- When making an online payment with a Checking or Savings Account:
    1. When an online payment is made and there are not funds available (NSF), the payment is re-submitted a second time as early as the same business day (later that day) or the next business day in attempt to obtain the payment.

USING A DEBIT CARD OR CREDIT CARD ON THE WEB:

- Credit / Debit cards accepted: Visa, Master Card, Discover, Star, Pulse or NYCE. This includes pre-paid gift cards and credit cards (ex: H&R Block). American Express is **NOT** accepted.
- $2.95 service fee per transaction.
- This type of payment **is accepted** even when there is a "No Personal Check" code on an account.
- When processing a Credit or Debit card payment, the transaction is done in "real time" and can not be scheduled for a future date. If the funds are not available the payment will not be processed. There should be no "return" payments on credit or debit card payments.
- The maximum payment amount allowed is **$1,000 per transaction** or TDB, whichever is less.
    - When a customer wants to **pay more than $1000** by a debit card or credit card, they must be transferred to a live ORCC representative. They will be required to make more than one transaction, and will be charged $2.95 per transaction.

VIEW ONLINE PAYMENT(S)

To see online customer payment(s) and payment type:

1. Click on the "CSR Module" hyperlink in IC Web (located under "Favorites")
2. Once logged in, click on the "Manage Accounts" tab
3. Enter the customer's Account number or Email address and then click "view" to view the "Enrolled Customer Profile" screen
4. Once on the Customer Profile Screen, click the "Payments" button
5. The customer online payment(s) will be listed here. Click on the confirmation number of the payment in question
6. Once the "Payment Search" screen appears, look under the "Transaction Information" heading
7. Look to the right of "Payment Source"
8. The type of online payment will be listed here ("One Time Pay" or "Epay")

PROCEDURE FOR CUSTOMER PAYMENTS

Customers that are paying with a checking or savings account should be directed to the Corporate Website as their first option, since it is a free service.

Payments entered prior to 4:00 P.M. will be deducted from their accounts the same day (posting with the 10:00 pm file). Payments made after 4:00 P.M. will be deducted on the next business day, (posting with the 4:00 am file).

If the customer is not able to access the Corporate Website, direct him/her to the ORCC automated payment line.

Situations where a live representative line should be used are:

- When you have the customer and an interpreter on the phone and they wish to make payment
- When a customer wants to pay more than $1000
- Situations where the customer claims they have problems using an automated system

If a customer needs to pay a shop bill or for a service line, they are to pay at a CAC only with cash, check, or money order. They can stop in to any CAC or mail the payment to the Appletree office. They are not able to have a credit on their account transferred nor are they able to pay through ORCC.

RESETTING A PASSWORD

A customer's on-line password can be reset by the customer on the National Fuel Website or through a NFG representative. In either case, remind the customer that passwords are case sensitive

When a customer needs their password reset through a NFG Representative:

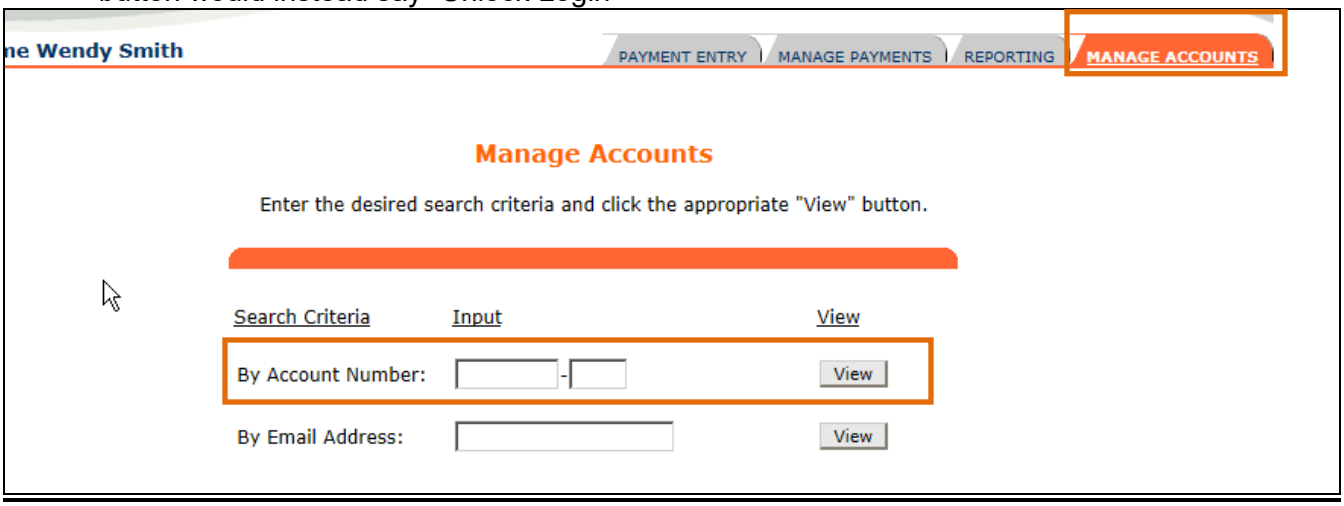
1. Click on the "CSR Module" hyperlink in IC Web (located under "Favorites")
2. Enter the customer's Account number or Email address and then click "view" to view the "Enrolled Customer Profile" screen.
3. Once in the "Enrolled Customer Profile" screen:
    a. Make sure the Login Status is not Locked. If it is, you must Unlock Login
    b. Confirm the customer's email address corresponds with the email address in the "Customer Information"
    c. Click "Reset User Password"
4. Advise the customer a new temporary password will be sent through email.

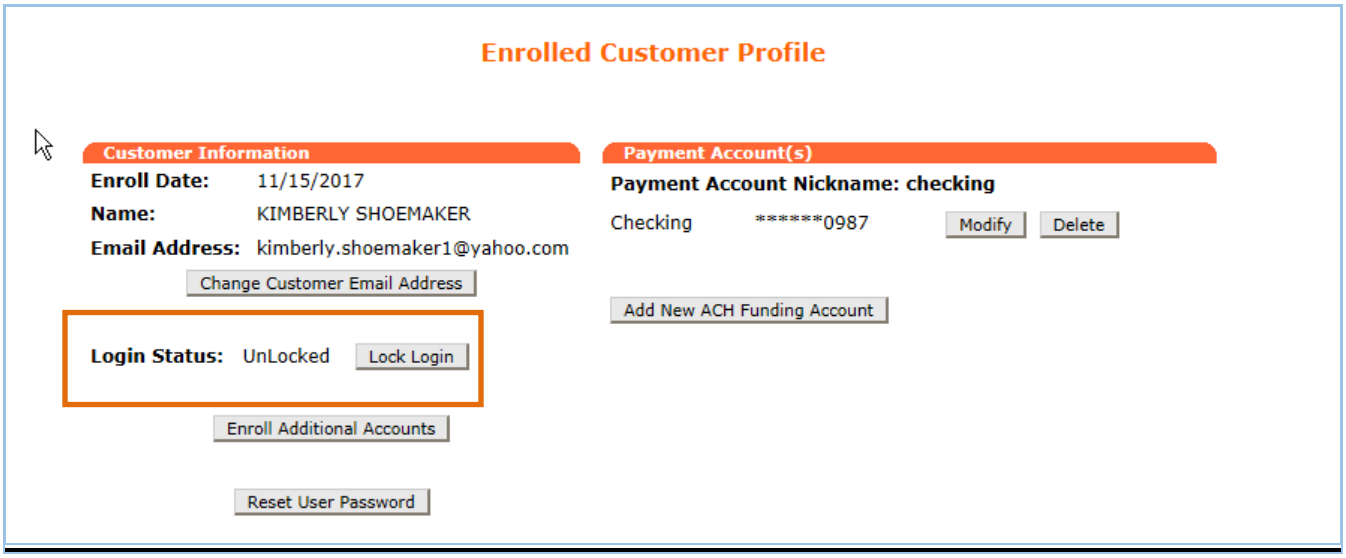
UNLOCKING LOGIN

A customer may have locked themselves out of their online account. This happens when they've made three unsuccessful attempts to log in.
A customer's account can be unlocked by the customer on the NFG Website or through a CSR.

When a customer needs their account "unlocked" by a NFG Representative:

1. Log in to the "CSR Module" by clicking on the hyperlink located in the "Favorites" section of IC Web
2. The screenshot below shows an account that is not locked. If it were to say "locked", the button would instead say "Unlock Login"





Customer who is logged in and can't change the amount or date of their payment

When a customer is enrolled in the Online Services, IC Web has the account coded "EBPP". A customer, who is enrolled online, may call stating they are logged in and trying to pay their bill online but wants to:

- Pay a different amount other than the current month's charges –or-
- Enter the payment date of their choice

When a customer logs in, the web site automatically directs them to the "Account Summary" screen. They cannot make a payment amount or payment date change on this screen. They must click "Pay Now" which then will then allow them to make the change accordingly.

Account Summary

Below you will find your account summary.
For each account you have activated for the National Fuel ePaybill service, you can view billing data and make a payment (if eligible).

Account Number	Service Address			Choice Customer
1234567-89	5555 PRETEND PKY			N
Bill Date	**Late Payment Date**	**Total Account Balance**	**Current Charges**	**Amount Due**
04/01/2010	04/30/2010	$79.49	$79.49	$79.49
			Pay Now	View Bills

ONE-TIME PAYMENTS

A customer can make a one time payment using the option of a checking or savings account or debit card or credit card.

A customer who is either enrolled (coded “EBPP”) or not enrolled can make this type of payment. However, the customer must not be logged on to their account when making a payment using this method.

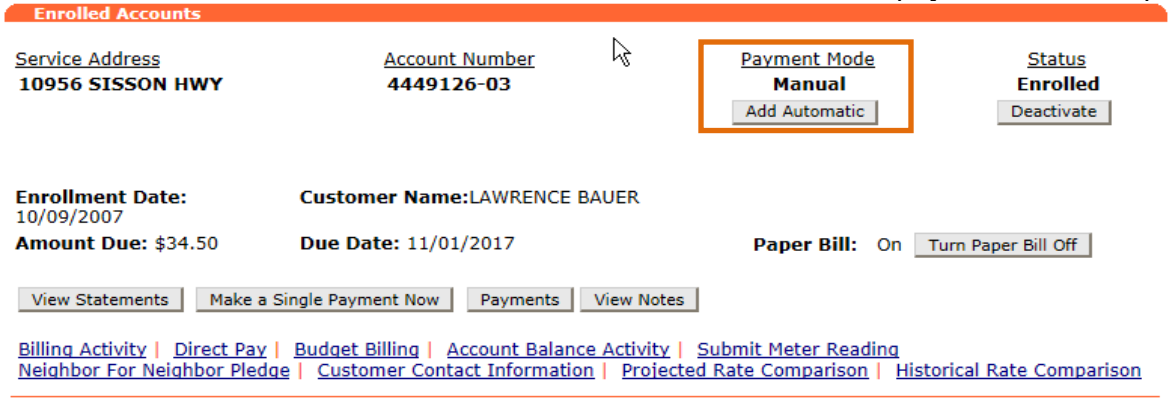
A one-time payment can be cancelled by a National Fuel supervisor when the payment is still pending.

Note: A customer whose account is coded “No Personal Check” cannot make an online One-time Payment using a checking or savings account. They must pay using a debit or credit card.

ENROLLED SCHEDULED (AUTO-PAY) PAYMENTS

A customer can enroll in “Automatic Payments” and allow payments to be made similar to that of the “Direct Payment Plan”.

When a customer is enrolled in the online services, IC Web has the account coded “EBPP” in the Consolidated View work center. When an enrolled customer claims they have scheduled a payment to be paid at a future date through the online auto-pay feature and they want to cancel the payment, the customer or the CSR can cancel the pending payment. The payment can be cancelled up to any point prior to the scheduled date and even on the scheduled date while the payment status is “pending”.



Payment Search

Search Results

Search Criteria

Date Range:	05/03/2017 - 04/28/2018
Filter:	Account Number 409869805
Created:	Mon Oct 30 13:35:07 2017

Click on a transaction number for more detail on a specific payment.

Search Results

Customer Name	Account Number	Confirmation Number	Pay Date	Status	Payment Amount	Fee	Total Debit
Moldex	4098698-05	191033840	08/07/17	Completed	$673.72	$0.00	$673.72
Moldex	4098698-05	190453149	07/07/17	Completed	$72.17	$0.00	$72.17
Moldex	4098698-05	191577844	09/05/17	Completed	$69.28	$0.00	$69.28
Moldex	4098698-05	20171011118179487	10/11/17	Completed	$69.29	$0.00	$69.29
Moldex	4098698-05	189880447	06/07/17	Completed	$911.74	$0.00	$911.74
Moldex	4098698-05	189322326	05/09/17	Completed	$365.02	$0.00	$365.02

The shorter confirmation numbers are a strong indication these payments were made via **auto pay**

PAYMENTS RETURNED BY ORCC

When a customer questions why we have a returned payment when they claim there was plenty of money in their bank account and/or we never attempted to take the payment out, review the account through online services.

If you see the returned reason of “invalid account number, it indicates that either the customer or live ORCC representative has made a mistake when entering the bank account information. The customer needs to make the payment again.

Transaction Information

Transaction Status:	Returned
Return Date:	**08/23/2011**
Return Reason:	**Invalid Account Number**
Reimbursed:	No
User Name:	otp_web
Team:	otp_web
Payment Source:	One Time Pay

Payment Information

Transaction Time:	Wed Aug 17 2011 02:43 AM
Payment Account Type:	Checking
Bank Routing Number:	*****0020
Bank Account Number:	*****5999
Name on Bank Account:	SAMIR JOA TRIAY
Bank Account Address 1:	106 BIRD AVE UPPR
Bank Account Address 2:	
Bank Account City, State Zip:	BUFFALO, NY 14213
Pay Date:	08/17/11
Payment Amount:	$20.54
Fee:	$0.00
Total Debit:	**$20.54**
Confirmation Number:	20110817121284315

If a customer asks why their payment bounced (Was charged back):

1. Log in to the "CSR Module"
2. Once logged in, click on the "Manage Accounts" tab
3. Enter the customer's Account number or Email address and then click "View" to view the "Enrolled Customer Profile" screen
4. Once in the "Enrolled Customer Profile" screen, the reason for the chargeback will appear under Return Reason

The "NOC" reason for both the representative and the customer will be abbreviated. Representatives and customers can review prior bounced online payments and NOC reasons under the selection "Payment History". There is an "ACH" code as to why the customer payment was charged back.

CHANGING "PAPER BILLS" OPTION

When a customer calls claiming they are not receiving their bill and their account is coded "EBPP", check to see if the "BILL OFF" indicator is selected in **Consolidated View**.

If there is no coding on the customer's account:

1. Check the Interaction Records to see if there are any "Returned Mail" notes
    a. If so, advise the customer we have mailed a paper bill but the post office has returned their bill to NFG
    b. Confirm their mailing address and update if necessary

If the account is coded "BILL OFF"

1. Advise the customer that the "Paper Bill" option has been turned off

    a. They have opted not to receive paper bills mailed through the mail. They receive email notifications that their bill statement is available. We can change the option in csr module, or they can change it in the online account.

ENROLL ADDITIONAL ACCOUNTS

When a customer has an account coded "EBPP", opens an additional account, and wants to access their additional account online, they need to add the new account by enrolling through Manage Profile.

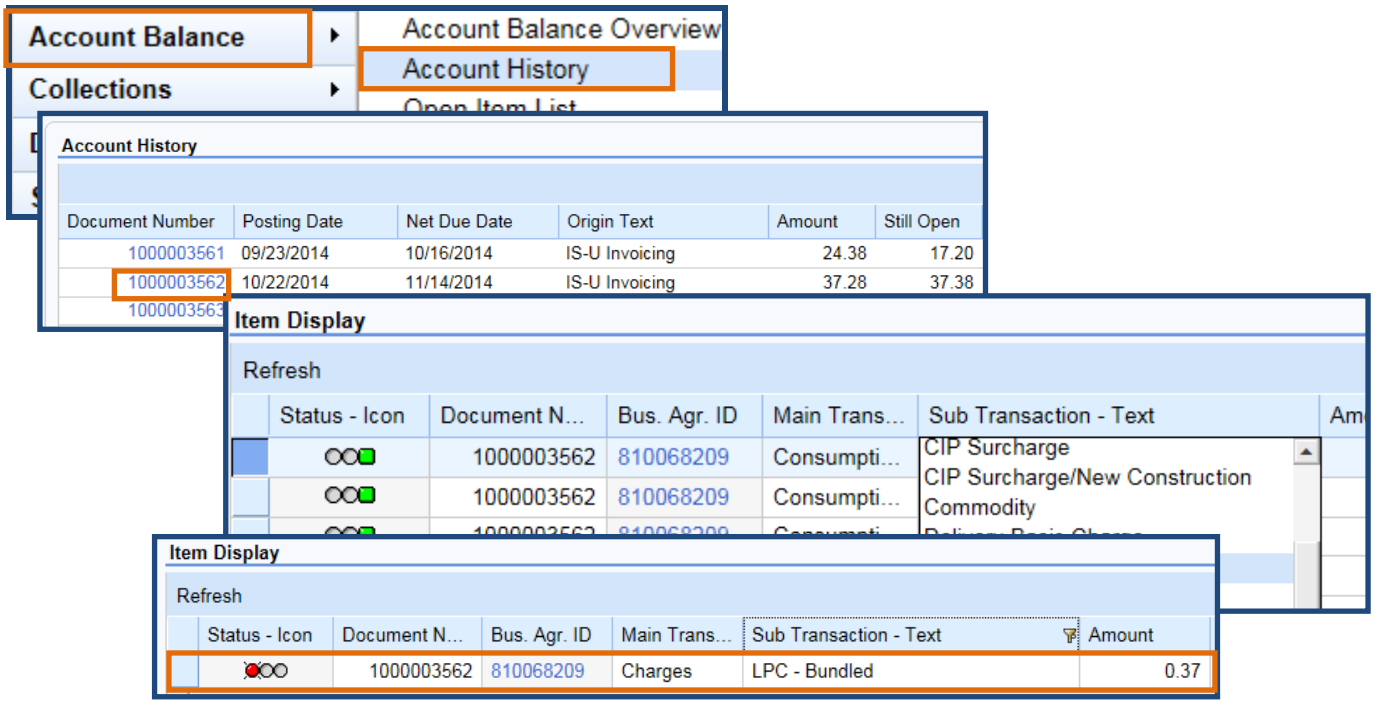
To Waive Late Payment Charges (LPCs)

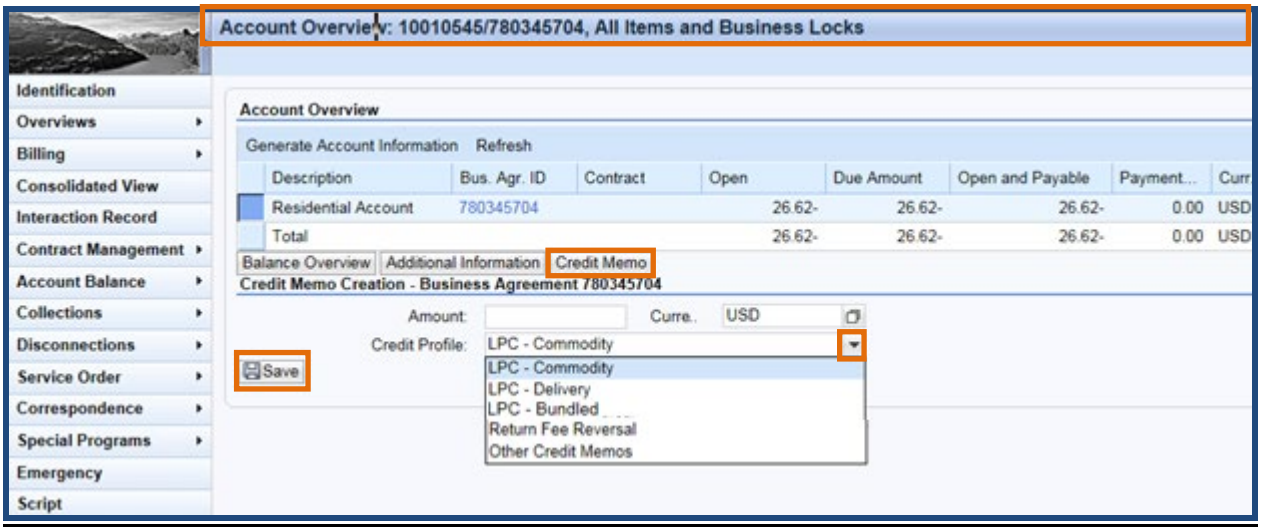
1. First, you will have to find the invoice in question that has the LPC. Most likely, the customer will be calling and stating that they have a LPC on their most recent bill (if the LPCs cover multiple invoices, then you will have to manually look at each invoice document to find what amount should be waived)
2. To find the amount of the LPC, you could either view the bill image through **Billing Overview** or the CSR Mod
3. Or, to find the LPC in the system, go to **Account Balance** > **Account History** to view all invoice amounts that have been billed
4. Click on the Document number hyperlink to view all the items that make up the invoice that the customer is calling about
5. Once you select the document in question, you can simply page through and search for the LPCs, or if you want to narrow down your search, click on the "SUB TRANSACTION – TEXT" column and scroll down the list to filter by LPC's
    - If there are no LPC's on the invoice selected, than you will not find any in the list. This list only shows all the actual charges on the invoice.
    - If you find an LPC on this list, select it and the amount will be displayed. Note this amount
    - If the customer is not with a marketer, the total late payment charge will be listed as: "LPC – Bundled CR"
    - If the customer is with a Marketer, there will be two separate late payment charges listed as: "LPC – Comm Marketer CR" and "LPC – Delivery Marketer CR"
    - If you find more than one LPC type in the list, you will have to view each one to find the amount separately.

6. Once you have noted the type(s) of LPC(s) and the amount(s), go to **Account Balance** > **Account Balance Overview** and click on the **Credit Memo button**
7. Enter the amount to waive in the "Amount" field and hit "Enter" to make sure the decimal ends up in the correct spot so that you know you are waiving the correct amount
8. Choose the LPC type from the "Credit Profile" drop down
    - Note: if there were separate LPCs (i.e. one charge listed as "LPC – Comm Marketer CR" and one charge listed as "LPC – Delivery Marketer CR", they will have to be waived separately, DO NOT add them together and waive as one total)
9. Once the correct amount and LPC type are entered, Click "Save"
10. Record an Interaction Record with the reason for the reversal

- **Late payment charges should be eliminated at our discretion as a customer courtesy. Whenever a late payment charge is eliminated as a stand-alone transaction, it is MANDATORY that the reason is noted on the Interaction Record.**
- See screenshots on the next page for the steps to waive late payment charges

➢ ***If you waive the wrong amount of a late fee, you will have to create a BPEM Case for a Floor Supervisor to fix it.***




Account Overview: 10010545/780345704, All Items and Business Locks
Identification
Overviews
Billing
Consolidated View
Interaction Record
Contract Management
Account Balance
Collections
Disconnections
Service Order
Correspondence
Special Programs
Emergency
Script
Account Overview
Generate Account Information
Refresh
Description
Bus. Agr. ID
Contract
Open
Due Amount
Open and Payable
Payment...
Curr
Residential Account
780345704
26.62-
26.62-
26.62-
0.00
USD
Total
26.62-
26.62-
26.62-
0.00
USD
Balance Overview
Additional Information
Credit Memo
Credit Memo Creation - Business Agreement 780345704
Amount:
Curre..
USD
Credit Profile:
LPC - Commodity
Save
LPC - Commodity
LPC - Delivery
LPC - Bundled
Return Fee Reversal
Other Credit Memos