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Xcel Energy	Information Request No.	1
Docket No.:	E,G999/PR-24-2	
Response To:	Minnesota Public Utilities Commission	
Requestor:	Sally Anne McShane & Tera Dornfeld	
Date Received:	January 29, 2025	

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Question:

Describe how and when customer service representatives (or representatives) are trained to distribute Cold Weather Rule (CWR) appeal forms. Provide copies of any training materials, scripts, and guidance about CWR.<sup>1</sup>

<sup>1</sup> See CenterPoint Energy’s 2021 CAO-approved CWR script as an example. Docket No. E, G- 999/CI-20-375 Request to Modify Cold Weather Rule Reconnection Script, September 13, 2021.

Response:

Customer Service Representatives are trained during an eight-week period at the inception of their employment. Yearly training is performed thereafter on the Cold Weather Rule (CWR) and the appeals process in Minnesota. Agents also receive refresher training each year on the CWR before CWR begins in the form of slide shows and live interactive sessions with the training department, and additional training in the spring covers the credit appeals processes.

The CWR training materials provided to agents is provided in Attachment A. This version of our CWR training includes Minnesota specifics used in 2024 for all agents in each of the training sessions mentioned in this response. Additional training materials are provided in Attachments B, C and D. Attachment E contains information from our Customer Care Quick Reference system that is specific to the Minnesota CWR and payment arrangements available. This system is accessible for agents to reference throughout any telephone call at any time.

The script utilized by agents to inform customers about the appeals process is included in the response to Information Request #4.

Portions of Attachment A, B and C are marked “Not-Public” as they contain information that falls within the definition of “private data on individuals” as set forth

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in Minn. Stat. § 13.02 subd. 12 and Minn. Stat. § 13.679. This information includes screenshot examples of customer records in our system. Thus, Xcel Energy excises this information as protected data pursuant to Minn. Rule 7829.0500.

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Preparer: Diedra Howard  
Title: Director Customer Policy & Regulatory Compliance  
Department: Customer Assistance and Advocacy  
Telephone: 303-294-2295  
Date: February 7, 2025



# FALL CREDIT

2024



## OBJECTIVES

- Understand cold weather rule timeframes
- Set informal arrangements (MN)
- Set informal arrangements (Other States)
- Identify Heat Affected Accounts





## COLD WEATHER RULE

Describe “Cold Weather Rule” using 1-2 sentences in the team chat.

## State Specific Guidelines



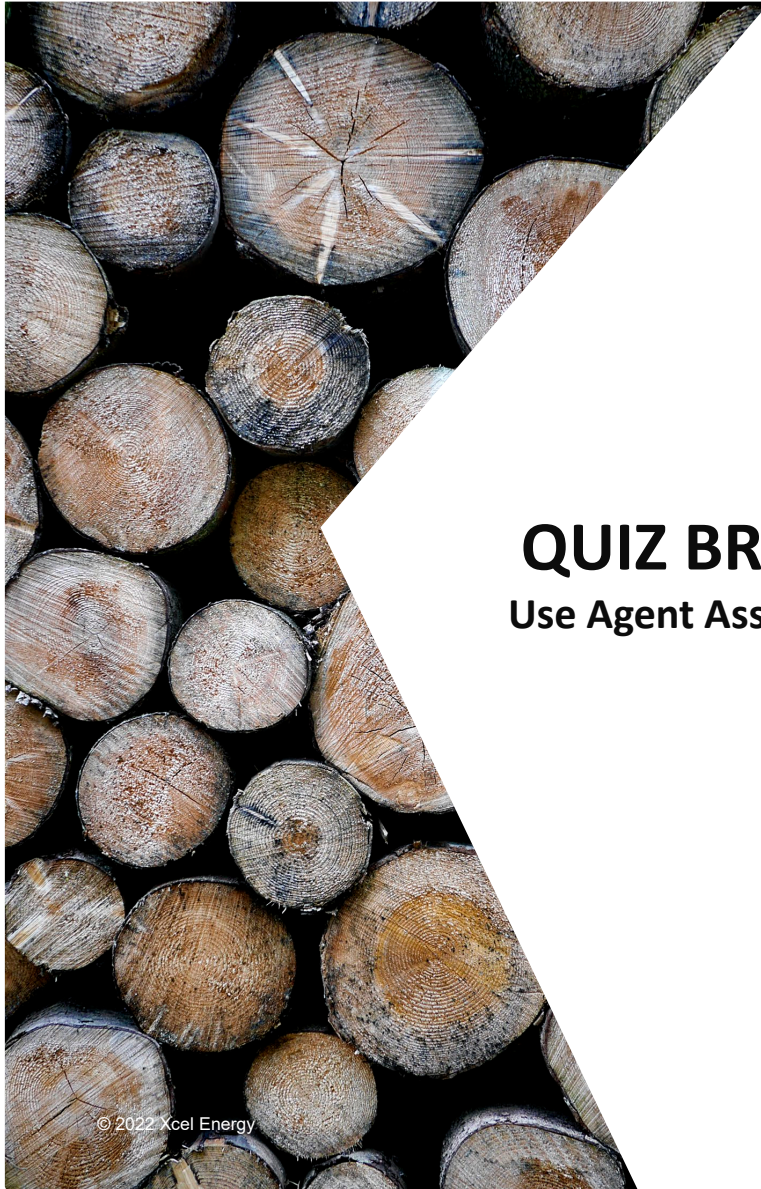
# State Specific Guidelines

## Minnesota

- October 1-April 30
- Heat affected homes are not disconnected
- Credit notices continue to be mailed
- Heat not affected customers can still be disconnected







**QUIZ BREAK**  
Use Agent Assist to help locate answers.

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## Heat Affected and Heat Not Affected Homes





**What is the difference between HA and HNA?**

**Heat Affected**



**Heat Not Affected**



When accounts are not clearly labeled as HA or HNA

Before  
December 2018 **Heat Affected**



After  
December 2018 **Heat Not Affected**



**When accounts are labeled as both HA and HNA  
The account may have multiple premises.**



Check Premise Enquiry>Details>Access  
To determine which premise is HA and which is HNA

## Pay Arrangements Formal vs Informal

**Xcel Energy®**

Northern States Power Company d/b/a Xcel Energy  
P.O. Box 9477  
Mpls., MN 55484-9477  
1-800-481-4700

07/09/2020

Service Address:  
Account Number:

### **DISCONNECTION NOTICE And Statement of Customer Rights and Information**

Dear

Your natural gas and/or electricity may be disconnected if we do not receive a payment of \$600.73 from you by 07/21/2020 or if you do not take immediate steps to remedy your past due balance.



## Formal vs. Informal Arrangements

### Best Practices

- During CWR, our best option for customers is to still set a formal arrangement, following our typical guidelines.
- **ONLY DURING CWR**, customers in MN, WI, MI, and SD can set a formal arrangement with a 5% minimum down payment (*Disconnection Balance or 60+ Days Past Due*)
- If we are unable to set a formal arrangement, then we could look to set up an informal arrangement.





**Informal  
Arrangements**



# Informal Arrangements Minnesota



# Informal Arrangements Minnesota



## Informal Arrangements Michigan & Minnesota Considerations

- In Michigan and Minnesota, a formal pay arrangement can disqualify residential customers from receiving crisis assistance funds.
- When asking a MI or MN customer about Energy Assistance, an informal arrangement may work best if they have recently applied for Energy Assistance, or plan to soon.



## Right to Appeal Process Minnesota

- The Right to Appeal process can occur when Xcel Energy and a MN customer can not agree on a mutually acceptable pay arrangement during the Cold Weather timeframe.
- Though this process is mostly handled by credit specialists, it is our role to escalate the calls when the occur.





# Right to Appeal Scenario

1. Jeremy, a Minnesota customer, calls during the Cold Weather time frame to set up a pay arrangement.



2. After discussing formal pay arrangement options, Jeremy is unable to pay the 5% minimum down payment.



3. Jeremy is uninterested in setting an informal arrangement, as he feels he should qualify for a formal pay arrangement.



4. Jeremy would like to discuss any other options he may have to avoid disconnection.



5. We follow our typical escalation process, which allows for a specialist to follow-up and determine next steps.





# Negotiation Training





Have you ever struggled to budget for, or been behind, on a bill before? What does this feel like to experience?



How does it feel when that weight has been lifted?



# Negotiation

## Leading the Conversation

- Prepare
  - Complete review of customer's account (Arrangement History, Balances, Disconnection Notices, etc.)
- Build Trust
  - Don't over assume what the customer may or may not know. Use verbal queues from the customer to gauge their knowledge.
  - Diffuse early questions and concerns. Trust your knowledge and expertise.



Total Account  
Balance: All  
balances, including  
overdue. This is our  
conversation starter.

60 or more Days Old:  
Amount we begin  
negotiations with, if  
disconnection balance is  
unavailable.

Overdue  
Balance: All  
balances not  
paid by due date.

Latest account  
due date: Date  
we can  
communicate to  
customer to  
inform them of  
account status.



Disconnection Balance:  
Begin negotiations from  
this amount when  
available.





Credit Lock-Unlock: Sys Gen Credit Lock: Indicates a pending disconnection. Review the order to determine if it's been assigned to "Collector in Field".



You can check to see if a customer's service has been disconnected by viewing meter details from the "Premise Enquiry" view.



You can review a customer's pay arrangement history from the "Credit Arrangements" view.

# Negotiation Structure



- Total Balance (*This typically preludes the actual negotiation.*)
- Full Past Due Balance (*If different than total.*)
- Disconnection Balance (*Or 60+ Days Past Due if unavailable.*)
- 1 to 2 Attempts at percentage of Disconnection Balance (*PAT*)
- Minimum percentage of Disconnection Balance (*PAT*)

After completing verification, we would inform [REDACTED] of his Total Balance and ask if he would like to make a payment today.

Assuming [REDACTED] does not have a disconnection notice, we would begin our negotiation here to set up a pay arrangement.

In this case, [REDACTED] Overdue balance is the same as his Total. We can skip this balance in this negotiation.



## Practice

Using the CRS Training Environment,  
list the various dollar amounts you  
would potentially use in a negotiation  
with the given customers.





# Negotiation Scripting

Thank you for verifying your account with me. I see your account balance is \_\_\_\_ and it's due on \_\_\_\_\_. Are you calling to make a payment on your balance?

Well, I'm calling because I don't have the money to pay that, and I don't know what my options are.

Sure! The next thing we can look at is your full past due amount, which is \$\_\_\_\_. By paying the full past due amount, your account will be current, and the courtesy calls and notices would stop.

I just don't have the money right now.

Okay! The only other option we may have is to set up a pay arrangement. This is where we'd take a smaller down payment today, and then set the remaining balance to be paid off in installments. It looks like we could move forward with a down payment of \_\_\_\_\_, which would prevent disconnection. Are you able to move forward with paying this amount?

The disconnection amount is out of my budget

There's not much additional flexibility. Can you make a payment of \$\_\_\_\_\_ today?

This is still out of my budget

**\*When offering minimum\*** The lowest we would be able to go would be \$\_\_\_\_\_. Is that a payment you can make today?

Sure. I can pay this down payment

*Reminder, sometimes past due is the same as current.*

*If the customer has indicated they have knowledge of what a pay arrangement is, omit the underlined portion.*

*These are the amounts we utilize the PAT to determine. (Notice we don't directly mention the percentages.)*

# Negotiations

## Closing w/ Arrangement



**\*When offering minimum\*** The lowest we would be able to go would be \$\_\_\_\_\_. Is that a payment you can make today?

Sure. I can pay this down payment

Let's review the terms of the arrangement. Okay we have processed a postdated payment for \$\_\_\_\_\_ scheduled to be drafted on XX/XX/XX (out \_\_ business days). This leaves your current bill of \$ \_\_\_\_\_ due by XX/XX/XX." "If there is nothing else, I want to thank you for taking the time to call today."

# Negotiations

## Closing w/ Next Steps



**\*When offering minimum\*** The lowest we would be able to go would be \$\_\_\_\_\_. Is that a payment you can make today?

I still can't afford that.

Okay. In this case, since we are unable to accept a down payment any lower than that, the next step I'd encourage would be to explore Energy Assistance programs. How much information have you received regarding Energy Assistance? \*Explain EA as needed.\*

**IF Applicable:** Just so you are aware, you will continue to receive courtesy calls and notices until an arrangement is set. **Or** Just so you are aware, we will be unable to issue a reconnection for your service until an arrangement is set.

If there is nothing else, I just want to thank you taking the time to call today.

# Tone

## Volume & Vocal Clarity

- *Speak with intent and confidence*
- *Avoid mumbling and stumbling (umm, uhhs, hmms.)*
- *Note your pace (It's likely you're talking faster than you think!)*

## Inflection

- *Try to leverage a soft or comforting inflection.*
- *Reminder that this is a customer going through financial struggles, and we may have to share details they don't want to hear.*

## Escalation

- *If the customer is escalated, do not rise to meet their tone.*
- *If we lose control of our tone, we lose control of the conversation.*





# Escalated Calls

## How to De-Escalate Conversations

Acknowledge
Stay Calm
Avoid the “Blame Game”
Be Confident
Re-Direct to Solutions



# Negotiation Scripting

This is ridiculous. So, you're telling me that I have pay \$300 or I get disconnected? The person I talked to last time didn't say anything about being disconnected. I want to be transferred to your manager.

Across the board, our procedures are very standardized for pay arrangements. There won't be anyone who can offer anything different regarding the down payment. I know you called today to get things moving in the right direction, and I really appreciate that \_\_\_\_\_, and I'd like to help as much as possible. What I would look at next, are Energy Assistance programs to see if financial support is available. (OR What I do next is explore local community agencies to see if they have financial support systems. Reaching out to family or friends is also a step I might take.)

*Acknowledge: In our statement we acknowledged their request to speak to a manager.*

*Re-direct to Solution: After acknowledging the customer's statement, we transitioned into offering a solution. Note the language we used to bring a positive light into the conversation.*

*Avoid the Blame Game:  
Rather than get into "Well the person who told you that..." statements. We moved passed it, and trusted our expertise to offer a solution.*

# Fixed + Current Arrangement





# Down Payment Guidelines

## 1 Collect

- Attempt to collect the DP the same day the arrangement is set

## 2 Disconnection Status

- MUST collect DP prior to setting arrangement if disconnection status is: Disconnection Pend, Collector in Field or Shut off for Non-payment

## 3 3 Day Billing Window

- If the DP will post in the 3 day billing window, the down payment should be added to the first installment. (see video)

### MAY 2025

SUN	MON	TUE	WED	THU	FRI	SAT
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

# Fixed + Current Pay Arrangements

- The Fixed Plus Current Pay Arrangement Plan allows a customer to evenly distribute arrears amounts in monthly installments in addition to the current monthly charges. The customer is required to pay the installment amount along with the current charges to satisfy the arrangement.



# Let's Listen to a Call

F+C, DP + 6 months



# Fixed + Budget Arrangement



# Fixed + Budget Pay Arrangements

- The Fixed Plus Budget Arrangement Plan allows a customer to evenly distribute arrears amounts over an 11-month or less period of time. It also establishes an Averaged Monthly Payment Plans/Equal Payment Plans (EPPs) for future charges. The customer is required to pay the installment amount along with the EPP amount to satisfy the arrangement.





# Let's Listen to a Call

FB w 5 or more broken  
arrangements



# Modify / Delete Pay Arrangements




# Modify a Pay Arrangement

- No amount of arrears is more than 60 days old
- No previous modifications on the current arrangement
- Only update is adjustment of due date - at least 3 business days before next reading date



# Delete a Pay Arrangement

- 
- Upon customer request
  - Correct billing errors

# Add a Down Payment as First Installment





# Add a Down Payment as First Installment

1. **Arrangement Type:** Select Fixed + Current or Fixed + Budget.
2. **Down Payment:** Check the down payment box and enter the agreed upon amount. Select today's date in the due date field as a placeholder.
3. **Number of Installments:** Enter the number of the agreement amount installments.
4. **Frequency of installments:** Select monthly.
5. **Installment Amount:** Take note of this amount as you will need to manually enter it in step 11.  

☐ Installment Amount
6. **Down Payment:** Uncheck the down payment box.
7. **Number of Installments:** Re-enter the agreed upon installments you entered in step 3.
8. **Frequency of installments:** Select monthly.

9. **Expiry Date of the First Installment:** Select the date approximately one month out from the latest account due date.

10. **First Installment:** Enter 0.00 for the amount due of the first installment.

#	Installment Month	Date Due	Amount Due	Amount Paid
1		04/15/2018	0.00	0.00

11. **Remaining Installments:** Enter the amount you noted in step number 5.

#	Installment Month	Date Due	Amount Due	Amount Paid
1		04/15/2018	0.00	0.00
2		05/15/2018	79.00	0.00
3		06/15/2018	79.00	0.00

12. **Amount Remaining:** Replace the 0.00 (step 10) with the amount shown in this field.

Amount Remaining		<input type="text" value="80.79"/>		
#	Installment Month	Date Due	Amount Due	Amount Paid
1		04/15/2018	80.79	0.00



Practice



# Modify / Delete Pay Arrangements



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Amount Remaining				
<input type="text" value="80.79"/>				
#	Installment Month	Date Due	Amount Due	Amount Paid
1		04/15/2018	80.79	0.00



# Practice



# Let's Listen to a Call


PA downpymt added to first  
installment



# Extension Plan Pay Arrangement



# Extension Plan Set Up

- 
- Always 1 installment
  - Due 3 business days before next reading date





# Practice






# Extension Plan Pay Arrangement



# Extension Plan Set Up – Finalized Account

- 
- A minimum 20% down payment
  - No longer than 3 months from date account was finalized



Practice



1. [REDACTED] calls on 06/09/24 about a disconnection warning notice he received in the amount of \$563.23. He mentions that he forgets about his bill and really needs a payment arrangement. He has had 6 broken arrangements in the past 12 months.




What is the minimum amount needed to establish a pay arrangement?

Per the pay arrangement calculator, what is the optimum installment number for this arrangement?

What type of arrangement

Would [REDACTED] be IVR eligible?


2. [REDACTED] calls on 06/05/24 about her past due account. After you verify the customer's information you notice the account has a credit lock-unlock PTJ that was "disconnection pending" for \$220.26 but the status is now showing system cancelled. She has had 3 broken arrangements in the past 7 months and mentions that because her bill fluctuates month to month it is hard to budget as she is on a fixed income.
- 

What is the minimum amount needed to establish a pay arrangement?

Per the pay arrangement calculator, what is the optimum installment number for this arrangement?

What type of arrangement would be best to set for Jane?

Would [REDACTED] be IVR eligible?

3. [REDACTED] has been out of town for the last couple of weeks because of a family emergency. She is unable to pay the total balance, after reviewing the account you confirm there is no disconnection warning and no previous broken arrangements.
- 

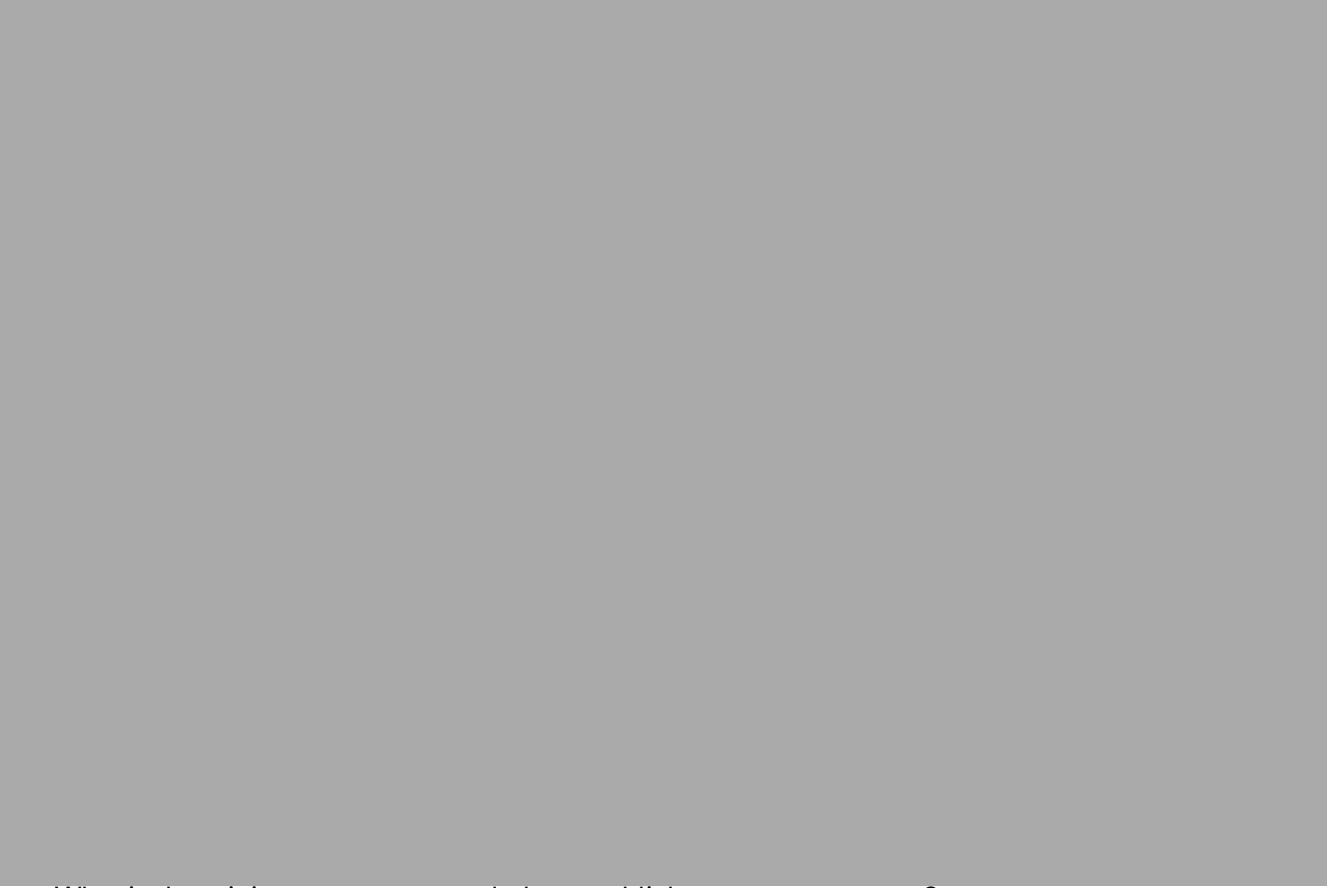
What is the minimum amount needed to establish a pay arrangement?

Per the pay arrangement calculator, what is the optimum installment number for this arrangement?

What type of arrangement would be best to set for Allyson?

Would [REDACTED] be IVR eligible?



4. [REDACTED] calls regarding a voicemail he received from Xcel Energy. After locating the account and verifying his identify it is determined the account has an active Credit Lock-Unlock Order with a 1st Call Pending status and one broken arrangement in the last 90 days.
- 

What is the minimum amount needed to establish a pay arrangement?

Per the pay arrangement calculator, what is the optimum installment number for this arrangement?

What type of arrangement would be best to set for Jed?

Would [REDACTED] be IVR eligible?

### Pay Arrangements General Information– Answers

1. True or False: A pay arrangement will eliminate the need to discontinue service as long as the arrangement is kept.
  - a. True**
  - b. False
2. What methods can customers use to establish a payment arrangement? Select all that apply.
  - a. IVR**
  - b. My Account**
  - c. Customer Service Representative**
  - d. Xcelenergy.com
3. What should you do before discussing a pay arrangement with a customer?
  - a. Inform customer of total balance, due date, and ask for payment in full**
  - b. Assume the smallest down payment and longest length are the best option
  - c. Set up a custom due date
  - d. Blame the customer for their account being in arrears
4. What type of pay arrangements can be established for customers? Select all that apply.
  - a. Extension Plan**
  - b. Fixed plus Current**
  - c. Fixed plus Budget**
  - d. Credit hold
5. True or False: Customers cannot be on Auto Pay and a pay arrangement.
  - a. True
  - b. False**

## Minnesota

## Xcel Energy Policy

- Residential Heat-Affected households will not be disconnected from October 1 through April 30.
- The Cold Weather Rule does **not** exempt customers from paying their bill during the winter months.
- Credit notices will continue to be mailed in the absence of a formal pay arrangement but will not be worked on Heat-Affected accounts during the cold weather time frame.
- Non Heat-Affected residential customers may be disconnected.

## State Guidelines

The Minnesota Cold Weather Rule is intended to provide eligible residential, "**Heat-Affected**" households protection from disconnection of the primary heating source during declared winter months, October 1 through April 30.

- Use the Pay Arrangement Tool to enter into a mutually acceptable arrangement, considering Extenuating Circumstances and income, and service will not be disconnected.
- Encourage income-eligible customers to apply for energy assistance effective Oct. 1.
- Utility services may be disconnected if a hazardous condition exists.
- Minnesota "Heat Not-Affected" customers can be disconnected all year long.

## What is Heat-Affected?

Any residential customer whose primary heating source would be affected by the disconnection of their gas or electric service. This can be natural gas that runs a furnace or electric service that runs a furnace fan or a primary heat source such as electric baseboard heat.

1. Analyze the account to determine if the customer is Heat Affected. **If Heat Affected status has not yet been populated with the Heat Affected status, treat the account as Heat Affected.**

- Review CRS Overview for status.

## Heat Affected:

Consumer
Premise
Direct debit plan Y
Next Reading Date
Postal address
Latest account due date
This customer has no current and no finalized periodic billing d
3 incomplete processes since 2018-01-25 01:13:54.
<b>HEAT AFFECTED</b>

**Heat Not Affected:**

Consumer
Premise
Direct debit plan Y
Next Reading Date
Postal address
Latest account due date
This customer has no current and no finalized periodic billing c
3 incomplete processes since 2018-01-25 01:13:54.
<b>HEAT NOT AFFECTED</b>

**Multi-Premise Account**

If the account has **multiple premises**, with a combination of Heat Affect and Not Heat Affected statuses, the banner will show both flags. Review the Premise Details to determine status.

- Review Access Information on Premise Details tab, which should include determination of Heat Affected status.
  - If date is prior to December 2018, treat as Heat Affected.
  - If information and/or date is missing, treat as Heat Affected.
  - If date is after December 2018, take action based on notation:
    - HA:** Heat Affected
    - HNA:** Heat Not Affected

See the [Heat Affected Job Aid](#) if you are having trouble identifying heat-affected status.

- Discrepancy in Status:** If there is a **discrepancy between a customer's claim of being heat affected and the account status**, email [Dawn Pittman](#) with the premise address and customer account/name. The field will review the status with the property owner or manager to see if anything has changed since we originally verified the status and update the account if needed.

**Fall Reconnection Plan****September 1 through September 30:**

PAR attempts to contact disconnected customers starting September 1 by phone or letter.

**Pay Arrangements****October 1 through April 30:**

Enter into a mutually acceptable payment arrangement considering Extenuating Circumstances and income.

- According to statute 216B.096 Cold Weather Rule - Public Utility: **"Reasonably timely payment" means payment within five working days of agreed-upon due dates.** A formal pay arrangement needs to be reset if the payment came in within five business days of the due date of the arrangement.
- Customers on the Power On program or Gas Affordability program do **not** need a formal or informal pay arrangement."

Customer must stay on the cold weather payment plan or contact Xcel Energy to request a modification of the cold weather payment plan during the cold weather timeframe.

**First Option - Formal Arrangement:** Negotiate a Fixed Plus Current or Fixed Plus Budget pay arrangement as this is the best solution for the customer and the business. Please attempt to set this type of arrangement with the customer, even if you need to go outside of guidelines regarding a down payment amount or due date.

- If the arrangement is set outside the state specific guidelines, be sure to note the reason why in the comments box of the arrangement.
- When payments are made in full and on time, a customer will not receive disconnection notices.

**Second Option - Informal Arrangement (HA Only):** If During the Cold Weather Rule (CWR) season, Minnesota Heat Affected customers not able to set a formal arrangement will be offered an informal arrangement. Please follow the process outlined below.

- This process pertains to HA customers only (effective Oct. 2024).
- Negotiate using the Pay Arrangement Tool (PAT)
- Advise customers while on an informal arrangement that courtesy calls/email and credit notices will continue to be sent during the cold weather time frame if needed for energy assistance.
  - No late fees will be assessed during this time.

The rate fees will be assessed during the time.

- Log a **Cold Weather Program PTJ: CUSTOMER CONTACT > CRED > COLD WEATHER PROGRAM** and enter details of informal arrangement in the notes section, like example below.

Type	CUSTOMER CONTACT	Class	CRED	COLD WEATHER PROGRAM
Status	Completed	Notified By		
Assigned To	SYSTEM			
Communication Method		Date Required	/ /	
Priority		Amount		
Customer				
Remise				
Contact Name				Services
Contact Address 1				
Contact Address 2				
Contact Phone				
Fax				
Contact Email				
Notes	Jason to pay \$100 a month advised will still get notices and will apply for EA			
Customer Notes				
Resolution		Marketing Code		
Spot	61 Chestnut	Date Completed	/ /	
Transaction Types				
Transaction ID				
				Clear



**Right to Appeal (Year-Round)**

If customers do not agree with arrangements, they have the right to appeal. Please follow the appeal process, which is in place all year long.

In the event that the call becomes escalated, agents should follow the **Contact Center Escalation Process**.

- If the caller is escalated up to a **Specialist** (per department escalation process), and the customer and Xcel Energy **do not agree** on a mutually acceptable cold weather payment plan, the Right to Appeal form may be requested. The **Specialist** will determine if a referral for issuance of the Minnesota Right to Appeal form is required.
- The **Specialist** will initiate the request to the Customer Advocate team via email to **dl Customer Advocate Team**.

Enter a **Customer Contact > Credit> Right To Appeal PTJ** on the customer's account.

- In the Notes field of the PTJ (Minnesota only), provide the following details:
  - Customer's name
  - Contact telephone number
  - Email address (A mailing address can be used if no email address is available.)
  - Include the terms of the offered arrangement either in CRS or the email body
- Once submitted, the PTJ is assigned to the CRS - Work Group (CRED SPEC WORK GROUP) for the Customer Advocate group to send the appeal form to the customer. The queue will be MN APPEALS.