**Pacific Gas and Electric Company**

**2015 ES&S Time Keeping Guidelines**

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# ES&S Operations

ES&S uses **PG&E @ Work for Me Time Entry Application** to charge time against the various programs and initiatives the department is involved in. It is structured by Activity Type, Order Number and Type. This document serves as timekeeping governance for ES&S in addition to the Web Training Course **TIME-0005WBT (Self-Service Time Entry and Approval)** in My Learning. Nearly all of the timekeeping categories described in this document apply to ES&S; there may be some minor differences within your area. The table below summarizes the current WMM structure.

**Table 1 – Order Structure**

|  |  |  |  |
| --- | --- | --- | --- |
| **Work Type** | **Attendance / Absence Type** | **Work Category** | **Notes** |
| **Administrative** | Administration |   | General administrative tasks, reading general email, timecards, staff meetings in general (unless it is broken out by productive categories), Attending personal development trainings not related to a specific program type, Participation in safety meetings and activies, Participation in PG&E sanctioned event where no PG&E business topics are discussed or presented (e.g. volunteering at Food Bank) |
| **Non-Productive** | Safety |  |  USE THE “SAFETY ACTIVITIES” OPTION IN THE SAP DROP “ATTENDANCE TYPE” DROP-DOWN |
| Floating Holiday |   | Same as above for this category |
| Company Holiday - Paid |   |  Same as above for this category |
| Sick Relative |   |  Same as above for this category |
| Sick |   | Same as above for this category |
| Vacation |   |  Same as above for this category |
| Vacation Buy |   |  Same as above for this category |
| Funeral |   |  Same as above for this category |
| Indust Injury |   |  Same as above for this category |
| Jury Duty |   |  Same as above for this category |
| Time Off w/ perm w/o pay |   |  Same as above for this category |
| Time Off w/o perm w/o pay |   |  Same as above for this category |
| Military Leave |   |  Same as above for this category |
| Time Off w/ perm w/ pay |   |  Same as above for this category |
| **Productive** | Hours Worked | CEE 2013 - 2014 Program Years | See pg 3 |
| On-Bill Financing (OBF) | See pg 4 |
| DR / Ld Mgt  | See pg 4 |
| Non-Balancing Work (Prg IV) | See pg 5 |
| Business Attraction and Retention (Prg FK] | See pg 5 |
| Time Varying Pricing | See pg 6 |
| Electric Outreach | See pg 6 |
| Gas Outreach | See pg 6 |
| Pipeline Pathways | See pg 7 |
| Storms | See pg 8 |

**Figure 1 - PG&E @ Work for Me Time Entry Application**

**Activity Type, Receiving Order Number, Attendance/Absence Type, Hours.**



# CEE 2013 - 2014 Program Years (Balancing Account)

Customers contribute to the Public Purpose Program (PPP) charge on their monthly bills, and this is the money that funds the balancing account. Customer Energy Efficiency (CEE) is a significant portion of the PPP charge.

**Table 2 – CEE Work Categories**

|  |  |  |  |
| --- | --- | --- | --- |
| **Order Name** | **Description** | **Who should use it?** | **Notes** |
| 2013-CEE ALLOCATION-I-CHIN-XXXXX (CHIN stands for Charge-In) | -Any direct interaction with customers | CRMs/account reps | Non-CRM/account reps employees can use this category if they have direct interaction with SMB/Res customers |
| -Customer touches |
| -Energy Audits |
| -Training and education provided by CEE program administrators (Core, 3P, GP, etc.) | Anyone receiving program specific training | Does NOT include personal development training (sales training, skills courses, etc.).  |
| - Travel and conference costs (labor, fees, lodging, travel) for those trainings |
| 2013-CEE ALLOCATION-CHIN-A-XXXXX (CHIN stands for Charge-In) | -Support of CEE initiatives | Non-CRM/account rep positions | CRMs/account reps can use this category if the CEE admin work is neither SMB nor LCI specific (like planning your work week or reviewing CEE material). |
| -Responding to data requests and financial and regulatory audits/filings | Sales Ops |
| - Strategic planning | -Sustainable Communities |

# On-Bill Financing (OBF) (Balancing Account)

OBF is a financing program that issues 0% Interest, zero penalty loans for installation of qualifying EE measures. OBF serves as an enhancement to PG&E’s existing rebate and/or incentive programs. ES&S supports this program with two work categories: OBF Implementation and OBF Marketing.

**Table 3 – OBF Work Categories**

|  |  |
| --- | --- |
| **Order Name** | **Task** |
| CEE13-14-ES&S-IMPL-OBF-XXXXX | Assisting a customer with the completion of the Payment History Review Template |
| Reviewing and providing the Payment History Review Template to the OBF Program |
| Collection, completion, review and submission of application package materials required for Pre-Field Review |
| Review, execution and submission of Loan Agreement |
| Collection, completion, and submission of application package materials required for Post-Field Review |
| Execution and submission of Loan Modification Agreement |
| Miscellaneous application questions and inquiries |
| Troubleshooting causes of failed payment screen |
| Coordinating between the customer/vendor/OBF |
| CEE13-14-ES&S-MKTG-OBF-XXXXX | Delivering OBF Presentations to potential customers and/or Implementers |
| Meeting and discussions for OBF offerings with customers |
| Miscellaneous program inquiries |

# Demand Response (DR) (Balancing Account)

PG&E's Demand Response programs are designed to enable customers to contribute to energy load reduction during times of peak demand. DR programs offer incentives to businesses that reduce the energy use of their facilities during times of peak demand.

**Table 4 – DR Work Categories**

|  |  |
| --- | --- |
| **Order Name** | **Task** |
| DREBA2012-14DR CORE MKT- XXXXX - M | Interaction with customers as it relates to DR programs |
| DREBA2012-14DR CORE E&T- XXXXXX - M | Participation or attendance of DR training and education |

# Non- Balancing Work (Prg IV)

Non-Balancing work includes all electric/gas service work with our existing customers, not the sales (Energy Efficiency) aspect of dealing with customers. It is funded by the General Rate Case (GRC).

**Table 5 – Non-Bal Work Categories**

|  |  |
| --- | --- |
| **Order Name** | **Task** |
| IV - METERING, BILLING & CREDIT - XXXXX | Time spent on resolving Billing/Credit, and Metering issues |
| IV - TARIFF, REG, INDUSTRY INFO - XXXXX | Customer interaction relating to Rates, Rules, Contracts, Tariffs, etc. |
| IV - RELIABILITY & SERVICE - XXXXX | Any time spent on electric/gas service related activities like: outages, service planning, etc. Reliability is the most common Non-Bal Work Category. |
| Community Edu. & Outreach-XXXXX | Planning and/or attending community events (Chamber of Commerce, local organizations, etc.) |
| DLT Support-XXXXX | Time spent on DLT rollouts including meetings, events, etc., any expenses related to DLT events like rewards and recognition, meals, supplies, etc.  |

# Business Attraction and Retention (Prg FK)

Economic Development and Customer Retention work associated with your area.

# Time Varying Pricing

As part of a plan by the California Public Utilities Commission to ensure greater power reliability and a better energy future, businesses are transitioning to a Time-Varying Pricing electric rate structure. Many customers have already made this transition, with more to come in the future.  These include: Large Agriculture, Large Commercial / Industrial, Small / Medium Business, as well as Small / Medium Agriculture Customers.

**Only customer-facing interactions should be charged to TVP**

* Non customer-facing personnel (local support, administrators, etc) will not charge any time to TVP. Employee expenses (mileage, meals, lodging, etc.) will not be allocated to TVP.

**Only identified ‘Most Impacted’ educations should be charged to TVP**

* Customer-facing employees will only charge to a TVP order number when working toward an identified ‘Most Impacted’ education. This includes preparation time directly related to a specific customer interaction (EI research, Tableau, etc).

**Ongoing PDP and TOU activities will be charged to appropriate, existing order numbers**

* Ongoing ES&S TVP activities (PDP notifications, Customer-Facing Events, BLT reporting, etc) will continue. Charging for these activities will use appropriate order numbers such as Non-Bal Rates, DR, Energy Efficiency, and others.
* Ongoing TVP Specialist activities will continue to be charged to the designated order numbers.

# Electric Outreach

ES&S supports Customer Impact in their Electric Outreach activities. CRMs/Account Reps/ES&S ELT should use this category to charge time spent on direct outreach or customer interactions **at the request of the Electric Reliability Specialist in your division**. This may include involvement in escalated customer complaints, canvassing (residential or commercial) and/or phone calls resulting from a project within scope (e.g. Targeted Circuit, TGRAM, FLISR, Reconductoring, NERC Alert, etc.).

# Gas Outreach

**PSEP (Pipeline Safety Enhancement Plan)**

* PSEP program rigorously verifies and upgrades the integrity of PG&E’s nearly 6,000 miles of gas transmission and distribution pipelines. Customer Impact along with ES&S provides customer support for PSEP.

**Other Gas Related Work**

* Customer Impact provides specific gas orders/projects to use on an as needed basis.

# Pipeline Pathways

Pipeline Pathways is PG&E’s program to survey 6,750 miles of its gas transmission pipeline system for rights-of-way along residential, commercial and industrial areas. Following the surveys, the program identifies and removes any structure or vegetation that could interfere with PG&E’s ability to maintain, inspect and safely operate the pipeline. The Pipeline Pathways team in Customer Impact works closely with property owners to find a solution that benefits everyone, typically at no cost to owners. ES&S supports the Pipeline Pathways team with two work categories.

**Table 6 – Pipeline Pathways Work Categories**

|  |  |
| --- | --- |
| **Work Category** | **Task** |
| Multi Customer/Community Outreach | Outreach to groups of customers, not individual customers, regarding specific Pipeline Pathways work in their community. |
| Presenting information on the Pipeline Pathways Program to Home Owners Associations, at PG&E Community Open Houses, or canvassing neighborhoods.  Follow-up phone calls to groups of customers. |
| Organization Outreach | Outreach to organizations such as Farm Bureaus, Chamber of Commerce, etc. |
| Meeting with organizations to provide general information on the Pipeline Pathways program, giving presentations to the membership of organizations on the Pipeline Pathways Program.  Follow-up with the organizations and providing collateral material. |

# Storms

ES&S supports Major Events (Storms, etc.) by providing assistance to Electric Operations at the Region Emergency Centers (REC) and Operations Emergency Centers (OEC). The REC/OEC Incident Commander or your supervisor will provide order numbers to use for your time. Each storm will have unique orders. These orders are to be used only for time spent in the REC/OEC. Storm support performed from other locations will be charged to IV - RELIABILITY & SERVICE.

# Unique Situations

**Table 7 – Unique Situation Charging Guidance**

|  |  |
| --- | --- |
| **Situation** | **Guidelines:** |
| You are driving after hours to another location for a meeting that will take place the following day. | Charge out the after-hours drive time to the same ratio of order numbers you used for the meeting itself, but use the “travel” option under activity type (Att/Abs type) in SAP. |
| You work a very long day and your supervisor approves you to leave a small amount earlier on the following day or another day within that same week. | Charge the extra hours to the order number you were working on. On the short day, charge to “Time off With Pay.” (Note: A future time entry system update will allow a check on total hours per week instead of total hours per day. At this point you wouldn’t do Time-Off With Pay and would just leave the day short).  |
| You work on-call duties in the middle of the night but don’t report to the EOC for a storm | Charge those hours to reliability |
| You work EOC duties for a storm due to a request to report to the EOC | Charge to the order number given for the storm |
| You work a community event on a weekend | Charge to the Community events category |
| You work a community event after hours | Charge to the Community events category |
| You are on an RDO schedule and there is a holiday that day | Be sure to add in one hour of “floating holiday” to the normal holiday to get to the required 9 hours for that day. |
| You want to do a one-time switch of your RDO to another week | You need the timekeeper to do a temporary schedule change in CATS |
| You are authorized to charge overtime for Storm activities where you were physically located in the OEC or REC. This starts at 2 hrs past your scheduled work day (i.e. overtime would be everything past 10 hrs on an 8 hr day, or everything past 2 hrs on a holiday or weekend). | Enter the storm order number given into SAP the receiving column, “4” in the work reason column for “overtime at standard rate”, “hrs worked” in the activity type column, and “0005” in the Operation Column (you may have to add some of these columns back into SAP to be visible if your removed them in your template). |

# ES&S Leadership & Administrative Assistant Charging Guidelines

**ADMINSTRATIVE ASSISTANTS:** All time charged to a PCC by Leadership and Admin employees is distributed over all of the order numbers that their own team uses by splitting it out at the same ratio that their team charges to these order numbers. As a result, a time keeper should charge all time to their PCC (Hours Worked category) or other standard exceptions (Sick, Holiday, etc.). The following additional exceptions should be used as well:

**Table 8 – Administrative Assistant Unique Situation Charging Guidelines**

|  |  |
| --- | --- |
| **Situation** | **Guideline:** |
| You are assisting the DLT Manager with DLT work | Charge to the DLT order number |
| You are brought in to work on a special project or issue with a special order number (BI, CI or ES&S) that wouldn’t be appropriately distributed in the right ratio amongst your employees. | Charge to that order number. |

**SUPERVISORS:** All Supervisor time should also be charged to the PCC (Hours Worked) or other standard exceptions (Sick, Holiday, etc.) for the same reasons listed above for time keepers. The following additional exceptions should be used as well:

**Table 9 – Supervisor Unique Situation Charging Guidelines**

|  |  |
| --- | --- |
| **Situation** | **Guideline:** |
| You work EOC duties for a storm due to a request to report to the EOC or REC. | Charge to the Storm order number associated with that storm. |
| You work a community event that none of your employees attend. | Charge to the Community Events order number. |
| You are brought in to work on a special project or issue with a special order number (BI, CI or ES&S) that wouldn’t be appropriately distributed in the right ratio amongst your employees. | Charge to that order number. |

**DLT MANAGERS:** All DLT Manager time should also be charged to the PCC (Hours Worked) or other standard exceptions (Sick, Holiday, etc.) for the same reasons listed above for supervisors. The following additional exceptions should be used as well:

**Table 10 – DLT Manager Unique Situation Charging Guidelines**

|  |  |
| --- | --- |
| **Situation** | **Guideline:** |
| You are working on DLT issues (prep, attendance, follow-up) | Charge to the DLT order number |
| You work on a storm at the office or have EOC duties for a storm due to a request to report to the EOC or REC. | Charge to your division’s Reliability order number. |
| You work a community event that none of your employees attend. | Charge to the Community Events order number |
| You are brought in to work on a special project or issue with a special order number (BI, CI or ES&S) that wouldn’t be appropriately distributed in the right ratio amongst your employees. | Charge to that order number. |

**DIRECTORS:** All time should be charged to the PCC (Hours Worked) or other exceptions (Sick, Holiday, etc.)