We are very excited to present the July 2025 edition of the Pennsylvania Public Utility Commission's tips, tricks, and reminders newsletter for the benefit of the utilities represented by the Energy Association of Pennsylvania.

Tips and Tricks: Dispute Procedures and Account Statements

When a customer files a billing dispute with their utility company, the company is required to investigate the dispute using reasonable methods and provide the customer with the necessary information to make an informed decision. This information includes, but is not limited to, relevant portions of tariffs, statements of account and meter test results, as outlined in 52 Pa. Code §§ 56.151(1)-(5).

At the conclusion of a billing dispute investigation, the utility must ask the customer if they are satisfied with the outcome of the company's investigation and prepare an internal report documenting the dispute and its resolution. The contents of the report can change depending on whether or not the customer is satisfied with the utility's resolution. If the customer is satisfied, the utility report may be limited to reflect a statement of the customer's billing dispute, the utility's final position, and the date after which collections may resume. If the customer is not satisfied, then the utility report must be consistent with all the requirements in 52 Pa. Code §§ 56.152(1)-(7), the utility must tell the customer that a written copy is available in accordance with § 56.151(5), and the utility must refer the customer to the PUC in accordance with § 56.152(4).

When to Provide an Account Statement?

If a customer's complaint pertains to billing and the customer expresses dissatisfaction with the utility's resolution, or if the utility has issued either a written utility report or provided verbal dispute rights, then an account statement should already be included as part of the utility's internal report. In such cases, the utility should provide a copy of the account statement with the company report submitted to BCS.

Additionally, BCS encourages utilities to include an account statement with the company report on "OFF" complaints for the purpose of determining "good faith". We also encourage

utilities to provide an account statement when a customer requests a payment arrangement and there is a prior, unsatisfied PUC payment arrangement.

Why are Account Statements important?

A statement of account is an important document that offers a detailed, itemized summary of a customer's charges, payments, credits, and outstanding balances. It serves as an essential tool for ensuring transparency in billing practices, supporting the utility's position in the event of a dispute, and demonstrating compliance with regulatory requirements. It also helps resolve billing disputes, and ensures the utility can justify its position with accurate data. While individual bill statements provide a detailed view of the customer's account activity, they do not illustrate a pattern of usage or payment history like a statement of account.

What information to provide in an Account Statement?

Although the regulations do not define what information is required to be in a statement of account, it is reasonable to expect that a utility will include sufficient data and information to support its position in a dispute. For example, if the customer challenges a high bill and the company's position is that the usage aligns with historic patterns, the company should provide an account statement that includes usage history over an adequate period to substantiate that claim. Similarly, if a customer disputes a late fee or security deposit, the utility should include a statement of account showing the customer's payment history over a relevant period of time, and the amounts of the disputed late fee or deposit.

Below are some examples of information that may be necessary for BCS to adequately investigate an informal high bill complaint:

- Ratepayer information (name, address, account number, rate class, service start date, etc. at the top of the statement).
- Transaction Date
- Transaction Type (bill, payment, adjustment, canceled, deposit, transfer, etc.)
- Rate Class (Residential or Commercial)
- Service From Date
- Service To Date

- Number of Days in Billing Cycle
- Start Read
- End Read
- Type of Read (actual or estimated)
- Usage
- Average Daily Usage
- Late Charges
- Amount Due
- Due Date
- Bill Issue Date
- Current Balance
- Balance Forward
- Deferred Balance (For CAP or Budget billing)
- Actual Balance

Depending on the disputed matter the following information may also be necessary on a statement of account:

High bill(s):

- Historic usage for at least the past two years
- Meter readings
- Degree days (if necessary)
- Consumption
- Read type (actual/estimated)
- If the customer has a supplier and what the supplier rate is

Customer Assistance Program (CAP) dispute related to amount of CAP discount or credit:

- CAP credits
- Date a balance is removed for CAP deferment and the amount
- Date a balance is added after CAP default and the amount
- The date the account was removed from CAP
- CAP bill amount vs. Actual bill amount
- Any credits or adjustments applied due to CAP
- CAP credits remaining

Shopping customer:

- Date of supplier enrollment
- Breakdown of supplier charges

PUC Press Releases:

PUC Chairman Stephen M. DeFrank Confirmed for Second Term - HARRISBURG – The Pennsylvania Public Utility Commission (PUC) today thanked members of the Pennsylvania Senate for unanimously confirming the reappointment of Chairman Stephen M. DeFrank to a second term as Commissioner and expressed appreciation to Governor Josh Shapiro for submitting the nomination.

Chairman DeFrank was confirmed June 4, 2025, by the Senate and will continue serving as Chairman of the Commission. His new term extends through April 1, 2030.

For more information see ***PUC Chairman Stephen M. DeFrank Confirmed for Second Term***

PUC Releases 2025 Summer Readiness Reports from Electric Utilities and PJM - HARRISBURG – The Pennsylvania Public Utility Commission (PUC) today released the 2025 Summer Readiness Overviews submitted by the Commonwealth's major electric distribution companies (EDCs) and the regional electric grid operator, PJM Interconnection, LLC (PJM).

The reports show that utilities and PJM have made extensive preparations to meet expected summer electricity demands, including system upgrades, emergency response planning, and coordination with regional partners.

For more information see ***PUC Releases 2025 Summer Readiness Reports from Electric Utilities and PJM***

Reminders:

Below is a list of upcoming reports and their due dates. If you have any questions regarding the reports or the data, please reach out to the contact person.

Report and Due Dates	Contact Person
Monthly and Annual Residential Collections Data (52 Pa. Code § 56.231(a) – (b)) **Larger EDCs/NGDCs** submit Residential Collections data monthly and annually through the Commission's online Collections Reporting System. **Due Dates:** 15th of each month for the previous month April 1st for the previous calendar year	Kathy Collins kathecolli@pa.gov (717) 783-1169 Sarah Dewey sdewey@pa.gov (717) 705-4029 Bureau of Consumer Services