Oracle Utilities Opower Affordability Proactive Alerts Cloud Service

Affordability Proactive Alerts Product Overview

Latest Release

F51172-12
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Oracle Utilities Opower Affordability Proactive Alerts Cloud Service Affordability Proactive Alerts Product Overview, Latest Release

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1

Getting Started

The Oracle Utilities Opower Affordability Proactive Alerts are email communications that educate customers about financial or energy assistance programs available from their utility. The alerts can be sent to customers who are likely to have trouble paying their utility bills, or to customers who are already behind on their bills. See these topics for more information:

- Customer Experience - Quarterly Alerts
- Customer Experience - Billing Triggered Alerts

For an overview of all cloud services available from Oracle Utilities, see the Oracle Energy and Water Cloud Service Descriptions online at Oracle Contracts - Cloud Services Service Descriptions.

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Requirements and Limitations

The following data requirements and limitations apply to all utilities and customers in the Oracle Utilities Opower Affordability Proactive Alerts Cloud Service.

Utility Requirements and Limitations

Category	Description
Scale	Scale restrictions may apply. The actual number of communications sent may be affected by attrition, opt-outs, customer eligibility, and data availability.
Localization	US English and Spanish are supported. Contact your Oracle Utilities sales representative or Delivery Team to confirm whether the alerts are available in your market.
Required Cloud Service	Affordability Proactive Alerts Cloud Service.
Data Integration	Data must be sent to Oracle Utilities in the correct schema and at the appropriate frequency. Your Delivery Team will work with you to set up the data integration and transfer process.

Customer Requirements and Limitations

Category	Description
Billing Frequency	The utility must bill their customers on a monthly, bi-monthly, or quarterly basis.
Data Delivery Frequency	Monthly, bi-monthly, and quarterly.
Data Requirements	Billing data is required. Program participation data is required to know what programs customers are enrolled in. See the Program Participation Data Transfer documentation for details.
Data History	The customer must have at least one bill of historical billing data in the form of monthly, bi-monthly, or quarterly read data. If the alert includes any insights that look back to customer energy use trends from the previous year, then billing data from the previous year is required.
Data Coverage	Data for a single bill period is the typical minimum data coverage requirement.
Supported Fuels	Gas, electricity, and dual fuel.

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Quarterly Alerts

The Affordability Quarterly Alerts are prescheduled email communications that are sent before the start of a season, and throughout the year, to educate customers about financial or energy assistance programs available from their utility.

Customer Experience

The Affordability Quarterly Alerts are prescheduled email communications sent each season that educate customers about financial or energy assistance programs available from their utility.

These alerts aim to reach customers who likely have trouble paying their utility bills, or who are already behind on their bills. The alerts include details about which programs customers are eligible for, and behavioral messaging that encourages them to enroll. The alerts can also direct customers to a central web resource, such as Savings Hub, if it is set up and configured by the utility.

Subject Line, Pre-Header, Header, and Footer

The email subject line, pre-header, and header engages the customer and brands the communication. The footer provides customers with links to manage preferences and unsubscribe from the email channel. It also contains the utility address, necessary legal text, and optional app download and social media links.

Requirements and Limitations

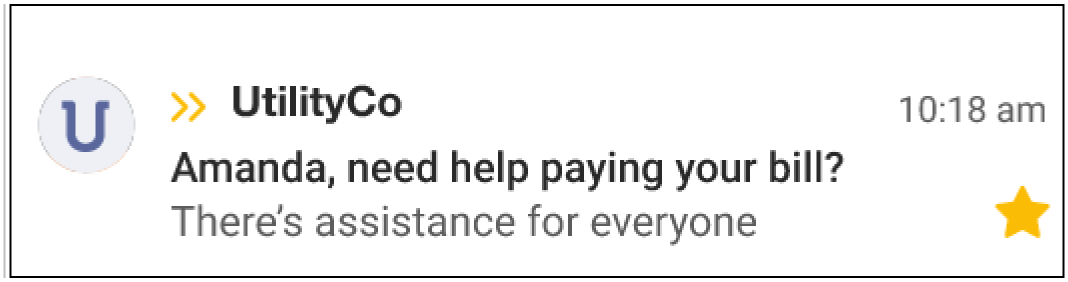
The requirements for these modules are the same requirements listed in Requirements and Limitations.

User Experience

The following sections describe the user experience for the subject line, pre-header, header, and footer.

Subject Line

The subject line is designed to catch the customer's attention and appeal to customers who may need assistance paying their utility bill, and varies depending on the season and whether the customer has started or completed the Savings Hub Survey. The default subject line is, (first name of customer), need help paying your bill?



Pre-Header

The pre-header text appears directly below the subject line and varies depending on if the customer started or completed the Savings Hub survey. See the image in the Subject Line section above for an example.

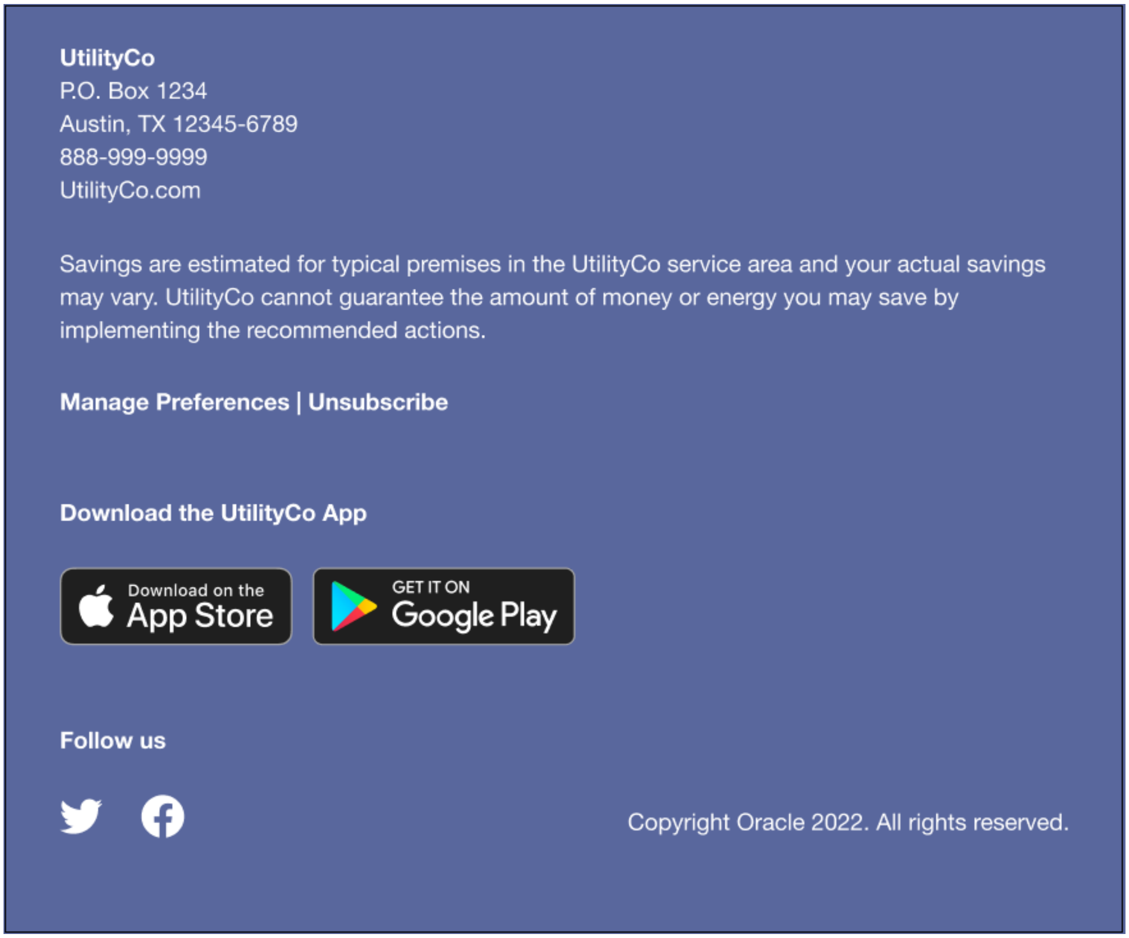
Header

The header appears before the Introduction module and includes a portion of the customer's account number.

Footer

The footer appears at the bottom of each email, and includes the following information:

- **Utility Address**: The utility's mailing address. The mailing address must appear due to CAN-SPAM regulations in the US and similar regulations abroad.
- **Manage Preferences**: A link to a web portal page where a customer can edit their report preferences.
- **Unsubscribe**: A link to a page where customers can unsubscribe from Affordability Proactive Alerts. An unsubscribe link must appear due to CAN-SPAM regulations in the US and similar regulations abroad. The URL the unsubscribe link points to cannot be customized. Unsubscribing from within the email unsubscribes the customer from all Affordability communications. This action is permanent.
- **Disclaimer**: This is an optional disclaimer that can be added at the request of the utility.
- **Legal text**: The copyright and any other legal text required by the utility or Oracle Utilities Opower.
- **App Download and Social Media Links**: Optional app download and social media links can be added at the request of the utility.



User Experience Variations

This topic describes the user experience variations of the subject line and pre-header.

Subject Line Variations

The subject line for Affordability Quarterly Alerts varies depending on the season, and also on the status of the customer's Savings Hub survey.

Season	Subject Line Variation
General (not summer nor winter)	• Unstarted Survey: [customer first name], need help paying your bills? • Started Survey: [customer first name], still need help paying your bills? • Completed Survey: [customer first name], help with your bills is waiting for you.
Winter	• Unstarted Survey: [customer first name], need help paying your winter bills? • Started Survey: [customer first name], still need help paying your winter bills? • Completed Survey: [customer first name], help with your winter bills is waiting for you.

Season	Subject Line Variation
Summer	• Unstarted Survey: [customer first name], need help paying your summer bills? • Started Survey: [customer first name], still need help paying your summer bills? • Completed Survey: [customer first name], help with your summer bills is waiting for you.

Pre-Header Variations

The pre-header for Affordability Quarterly Alerts varies depending on the status of the customer's Savings Hub survey.

Survey Progress	Pre-header Text
Unstarted Survey	There's assistance for everyone
Started Survey	Finish the 2-minute survey to see your assistance options
Completed Survey	Check out your recommended programs

Introduction

The Introduction module is what customers first see when they open the Affordability Quarterly Alerts email. This module is meant to engage customers who may need help paying their utility bill.

Requirements and Limitations

The requirements for this module are the same requirements listed in Requirements and Limitations.

User Experience

The user experience for the Introduction module includes the customer's name and a question asking if they need help paying their utility bill.

The following is an example of the Introduction module for the Affordability Quarterly Alerts email.

Introduction Variations

Customers will see slight variations during the winter and summer seasons.

Winter	Summer
• Header: [Customer's first name], keep your bills affordable and stay cozy this winter • Background Image: Winter street scene	• Header: [Customer's first name], keep your bills affordable and stay cool this summer • Background Image: Summer street scene

Insight

The Insight module for quarterly alerts cites the number of people receiving assistance with their bills within the same state or region as the customer.

Requirements and Limitations

The requirements for this module are the same requirements listed in Requirements and Limitations. Additionally, the number of customers who currently receive assistance is required. It is recommended that the utility use the Low Income Home Energy Assistance Program (LIHEAP) number from the previous year. Alternatively, a different statistic can be cited, such as the number of households in the customer's region. Your Delivery Team will work with you to collect and include this number.

User Experience

The user experience for the Insight module includes the following:

- Header: Tells the customer that they are not alone in getting assistance with their bills.
- Number: The number of households receiving assistance within the same state or region as the customer.
- Number Description: Text below the number complements it by making explicit what the number represents: the quantity of households that receive assistance within the customer's state or region.

The following is an example of the Insight module for quarterly alerts:

Insight Variations

For the winter and summer seasons, customers will see one of two variations of Insights, the default variation and the fallback variation. The default variation shows the customer's highest bill from last winter. However, if the customer doesn't have at least one bill from last winter, they will see the fallback variation of the Insight.

Winter

- **Default**: Winter bills can be higher than you expect [dollar amount] was your highest bill last winter
- **Fallback**: You can get help paying your bills [dollar amount] was the average winter assistance received in your state last year

Summer

- **Default**: Summer bills can be higher than you expect [dollar amount] was your highest bill last summer
- **Fallback**: Summer bills can be higher than you expect [dollar amount] for [UtilityCo] customers this summer

Numbered Steps

The Numbered Steps module for quarterly alerts shows three easy steps for the process of finding financial assistance through the Savings Hub survey.

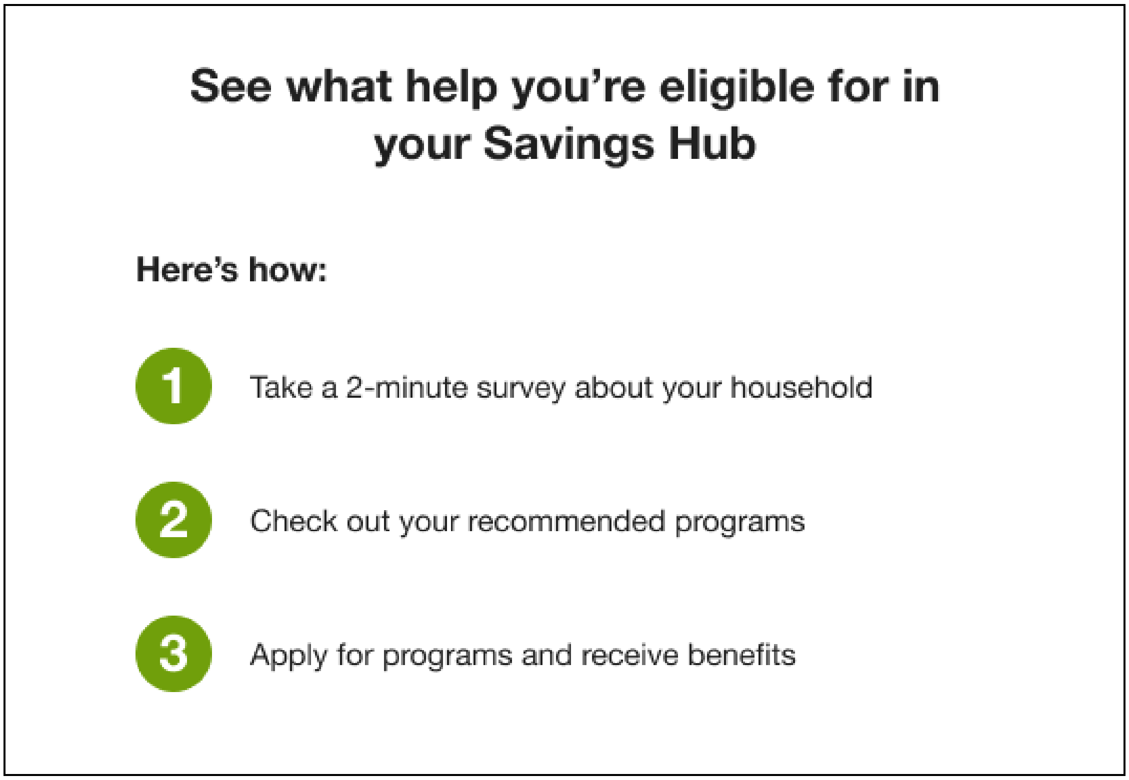
Requirements and Limitations

The requirements for this module are the same requirements listed in Requirements and Limitations.

User Experience

The user experience for the Numbered Steps module in quarterly alerts includes a header calling for the customer to see their eligible programs, and three steps outlining the process. Each step is preceded by a number icon.

The following is an example of the Numbered Steps module for customers who have not started the Savings Hub survey.



Numbered Steps Variations

The Numbered Steps module in quarterly alerts varies depending on the season, and on the status of the customer's Savings Hub survey.

General (Not Summer or Winter)

Survey Status	Variation Text
Unstarted Survey	**Step 1:** Take a 2-minute survey about your household.
Started Survey	• **Header:** Your savings Hub connects you to the help you need • **Step 1:** Complete the 2-minute survey about your household

Winter

Survey Status	Variation Text
Unstarted Survey	• **Default Header**: Get help paying your bills this winter • **Fallback Header**: See what you qualify for • **Step 1**: Take a 2-minute survey about your household.
Started Survey	• **Header**: Your savings Hub connects you to the help you need • **Step 1**: Complete the 2-minute survey about your household

Summer

Survey Status	Variation Text
Default and Fallback Unstarted Survey	• **Header**: Get help paying your bills this summer • **Step 1**: Take a 2-minute survey about your household.
Started Survey	• **Header**: Your savings Hub connects you to the help you need • **Step 1**: Complete the 2-minute survey about your household

Programs Overview

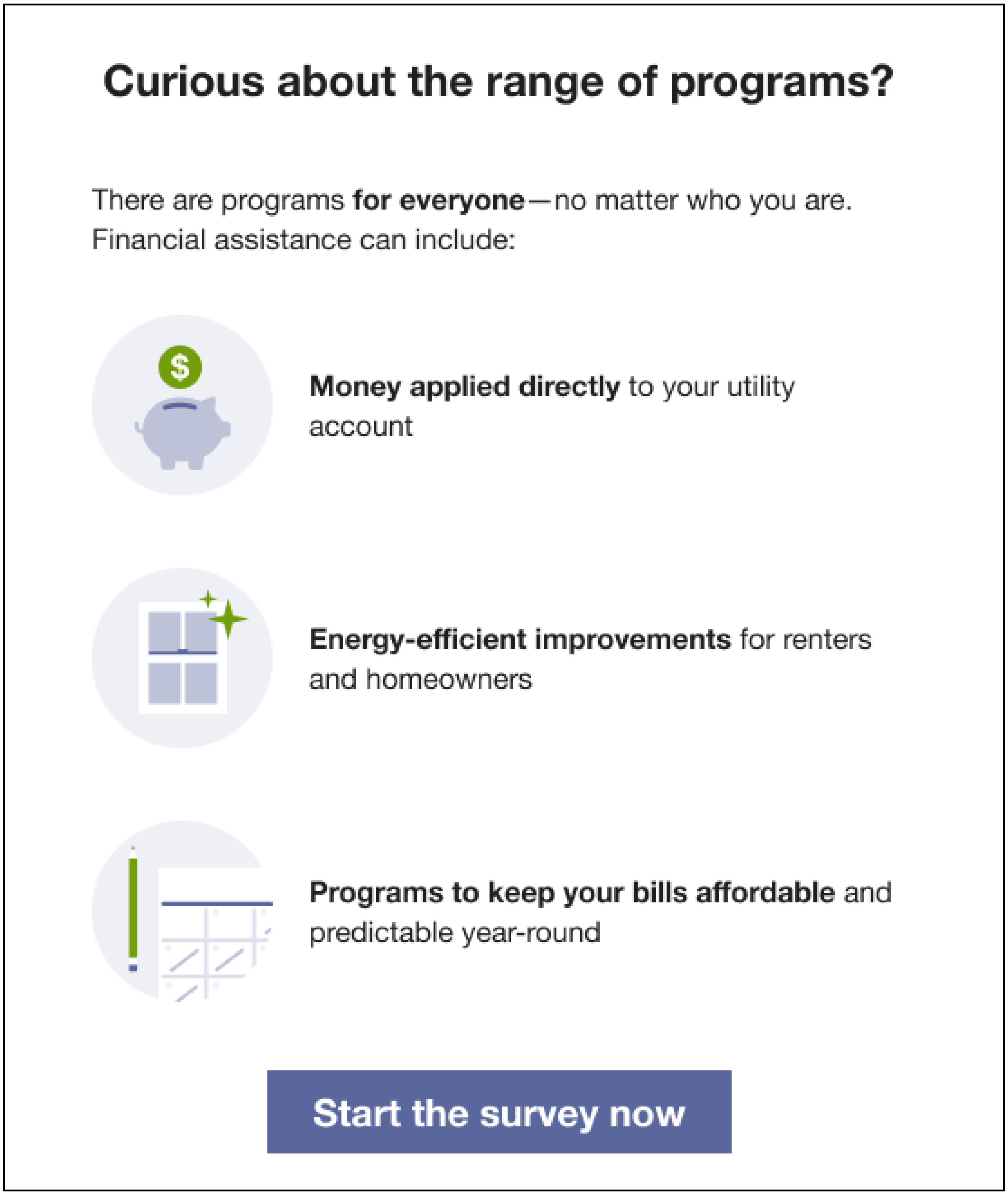
The Programs Overview module for quarterly alerts offers additional information about the type of financial assistance available through the Savings Hub. The module follows the first call-to-action module in the email for customers who have not started the survey, and provides more details for them as a motivator to start the Savings Hub survey. The module dispels common misconceptions about available help by emphasizing the wide range of programs available to people in a variety of circumstances.

Requirements and Limitations

The requirements and limitations for this module are listed in Requirements and Limitations.

User Experience

Customers who have not started the Savings Hub survey get the standard user experience for the Programs Overview module, which includes different types of financial assistance that a customer may receive, and a **Start Survey** button.



Programs Overview Variations

The Programs Overview module varies depending on the data state of the Savings Hub survey.

Survey Started

Call-to-Action Text: Complete the survey

Survey Completed

Call-to-Action Text: View your programs

Savings Hub Call to Action

The Savings Hub Call-to-Action module for quarterly alerts is meant to inspire customers to take action towards finding financial assistance through the Savings Hub survey.

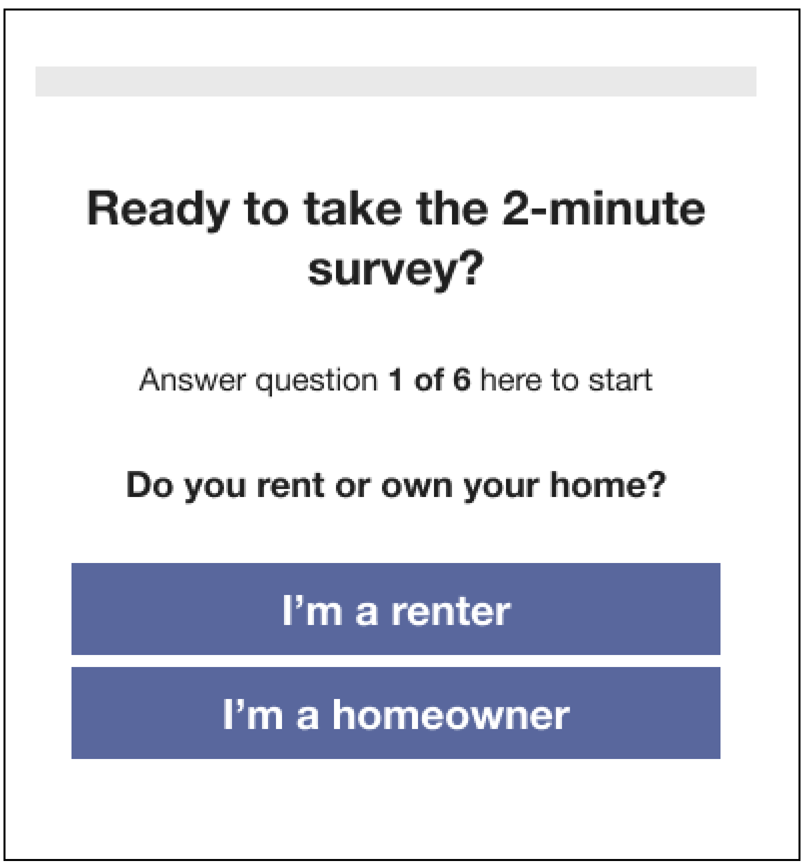
Requirements and Limitations

The requirements and limitations for this module are listed in Requirements and Limitations.

User Experience

The information displayed in the Savings Hub Call-to-Action module is based on whether the customer has not started, has started, or has completed the Savings Hub survey. The module includes a header, some body text, and call-to-action buttons that differ depending on the state of the survey. If the buttons are configured to use Magic Link, then clicking the buttons will take customers directly to the survey. If the buttons are not configured with Magic Link, then the customer will be prompted to sign in to their account before they can access the survey.

The following is an example of the Savings Hub Call-to-Action module for a customer who has not started the Savings Hub survey:



Savings Hub Call to Action Variations

The user experience for the Savings Hub Call to Action module for quarterly alerts varies depending on the data state of the customer's Savings Hub survey.

Survey Started

- **Header**: Complete the 2-minute survey to see what help you're eligible for
- **Body Copy**: You've answered X of X questions
- **Call-to-Action Button**: Complete the survey.
-
  > **Note**
  >
  > When customers click the button, the survey opens to where they left off answering questions. If the button is configured to use Magic Link, the customer will be taken directly to the survey. If it is not configured, they will be prompted to sign in to their account before they can continue the survey.

Survey Completed

- **Header**: Your Savings Hub shows assistance you qualify for
- **Body Copy**: There are programs waiting on you based on your survey answers
- **Call-to-Action Button**: View your programs

> **Note**
>
> When customers click the button they are taken to a list of available programs based on their survey answers. If the button is configured to use Magic Link, the customer will be taken directly to the survey. If it is not configured, they will be prompted to sign in to their account before they can continue the survey.

4

Billing Triggered Alerts

The Affordability Billing Triggered Alerts are email communications that are sent to customers at critical moments within their billing cycle to let them know that there are financial assistance programs available from their utility.

These alerts can be sent to customers who likely have trouble paying their utility bills, or who are already behind on their bills. The alerts include details about which programs customers are eligible for, and behavioral messaging that encourages them to enroll, and can also direct customers to a central web resource, such as the Savings Hub, if it is set up and configured for the utility.

Customer Experience

The Affordability Proactive Alerts Billing Triggered Alerts are messages sent at key moments within the customer's billing cycle, such as when they have an upcoming bill that they may not be able to pay, or when they are already late in their payment. This communication informs them that there is financial aid available for them.

Subject Line, Pre-Header, Header, and Footer

The subject line, pre-header, and header in Billing Triggered Alerts are used to engage the customer and brand the communication, while the footer provides necessary information and links to manage preferences or unsubscribe from the email channel.

Requirements and Limitations

This topic lists the requirements and limitations.

Requirements

The requirements for this module are the same requirements listed in Requirements and Limitations.

Limitations

Unsubscribe: Unsubscribing through the link provided in the email might be permanent, depending on how utility account preferences and unsubscribe policies are set up and configured. Contact your Delivery Team for additional information.

User Experience

This section describes the user experience the subject line, header, and footer components of the Billing Triggered Alerts email.

Subject Line

The subject line is designed to appeal to customers who may need assistance paying their utility bill, and varies depending on whether the customer has started or completed the Savings Hub survey.

Default subject line: '[first name of customer], need help paying your bill?'

Pre-Header

The pre-header text appears directly below the subject line and varies depending on if the customer started or completed the Savings Hub survey.

Header

The header information includes a logo provided by the utility, and the customer's name and account number. Most of the numbers in the account number are displayed as asterisks for security purposes.

The default header module includes the following components:

- A logo provided by the utility.
- The customer's name.
- The last four digits of the utility account.

Footer

The footer includes components that provide more context about the alert. These components include:

- An unsubscribe link
- A manage preferences link
- The utility's contact information
- An Oracle Utilities copyright statement
- A disclaimer statement (optional)

Typically, the footer information is the same for all outbound communications a utility sends.

Introduction

The Introduction module is what customers first see when they open the Billing Triggered Alerts email. This module asks the customer if they need help paying their bill, and offers help in finding financial assistance.

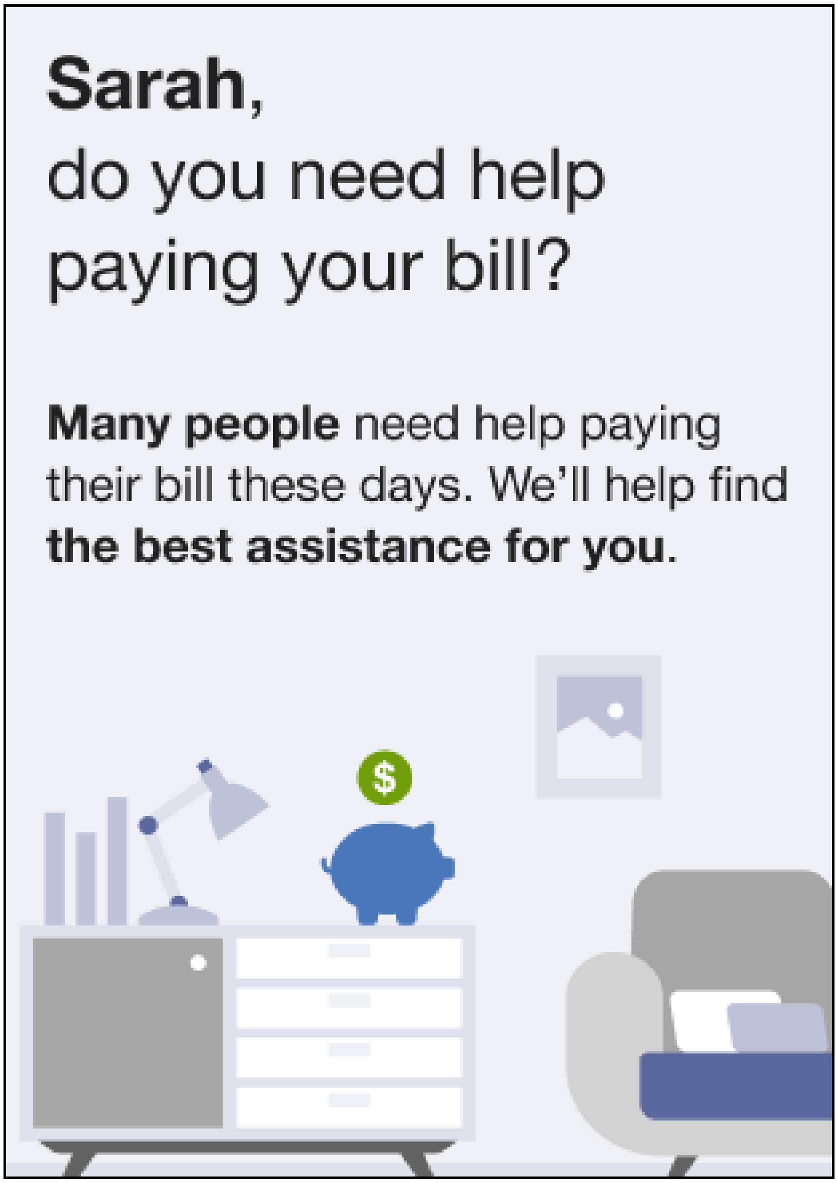
Requirements and Limitations

The requirements for this module are the same requirements listed in Requirements and Limitations.

User Experience

The user experience for the Introduction module includes the customer's name, a question asking if they need help paying their utility bill, and a brief message that points out that many people need help paying their bills, and that the customer can find financial assistance.

The following is an example of the Introduction module for Affordability Billing Triggered Alerts:



Past Due Bill

The Past Due Bill module for Billing Triggered Alerts shows the customer their due amount, and informs them of financial assistance programs that can help with their payment.

Requirements and Limitations

The requirements for this module are listed in Requirements and Limitations.

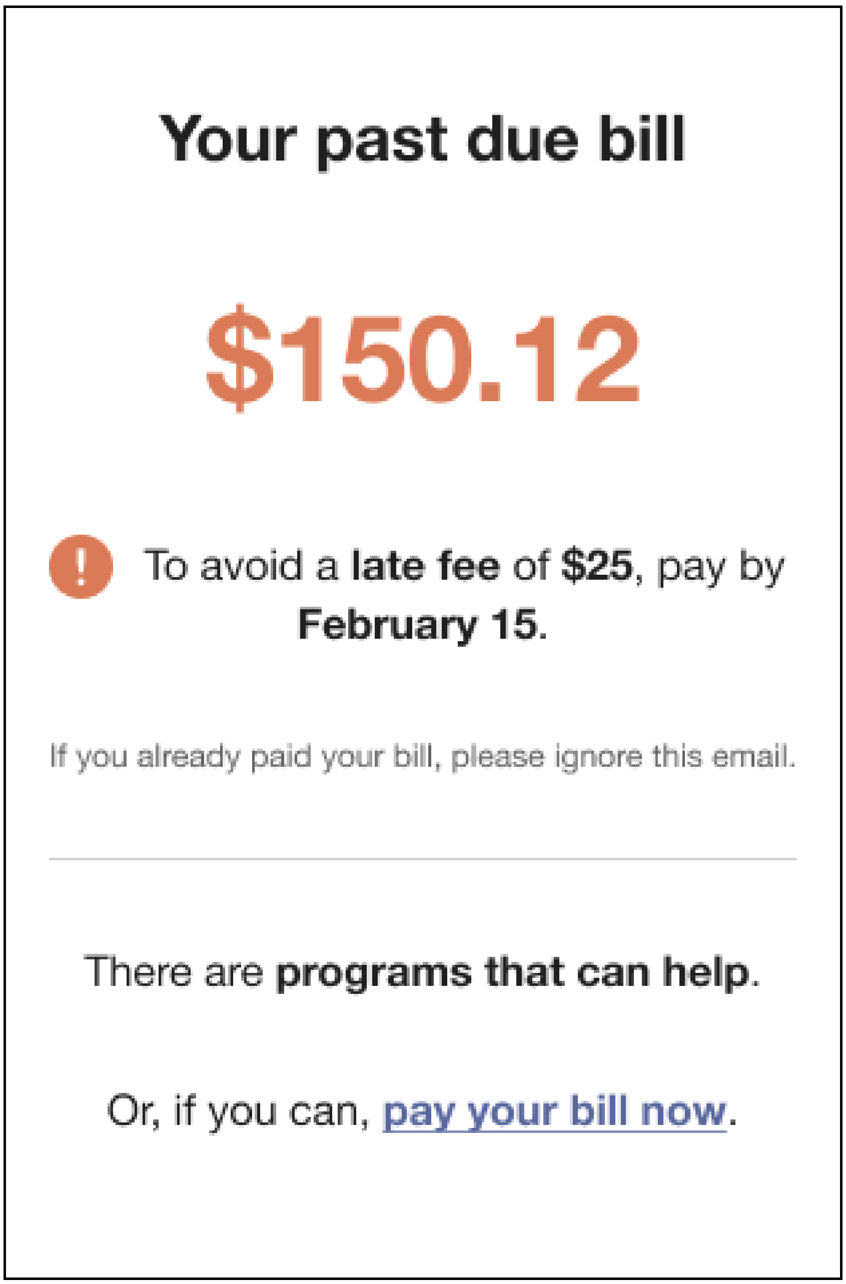
User Experience

The user experience for the Past Due Bill module in Billing Triggered Alerts includes the following components:

- **Header**: The text at the top of this module labels the amount that follows as the customer's due amount.

- **Due Amount**: The sum of money that is owed and unpaid as of the current date. Supported currency: US Dollar.
- **Milestone Text**: Note that informs the customer of the payoff date and the late payment penalty.
- **Disclaimer**: Statement that tells the customer that they can ignore this communication in case they paid their bill already.
- **Body Text**: Tells the customer that there are programs that can provide financial assistance, and contains a call-to-action URL for immediate payment.
- **Pay Your Bill Link**: Link to the utility's web portal.

The following is an example of the Past Due Bill module for Billing Triggered Alerts:



Past Due Bill Variations

This section describes the user experience variations for the Past Due Bill module.

Fee Milestone (Currency-Based)

In this variation, the Milestone Text includes the late fee amount (USD currency), and the date to pay by to avoid late payment charges.

Fee Milestone (Percentage-Based)

In this variation, the Milestone Text includes the late payment charges percentage, and the date to pay by to avoid late payment charges.

Disconnection Milestone

This variation appears once the payment collection process has initiated. In such case, the module shows the past due balance amount, as opposed to showing the latest past due bill amount. Likewise, the text refers to *past due balance*, instead of *past due bill*, and requires the customer to pay a minimum amount by a specified date to avoid disconnection.

No Date

When no date has been provided by the utility for the fee requirement, the *pay by* date is omitted from the module.

No Payment Amount

When no payment amount has been provided by the utility, the late fee amount is omitted from the module.

No Milestone - Past Due Bill

When the payment collection process has not yet been initiated, and there is no milestone data, the module shows the past due bill amount, and the milestone is omitted.

No Milestone - Past Due Balance

When the payment collection process has been initiated, and there is no milestone data, the module shows the past due balance amount, and the milestone is omitted.

Payment Arrangement

When the customer is on a payment arrangement and is late on paying their bill, the module includes text referring to the payment arrangement.

Numbered Steps

The Numbered Steps module for Billing Triggered Alerts shows three easy steps for the process of finding financial assistance through the Savings Hub survey.

Requirements and Limitations

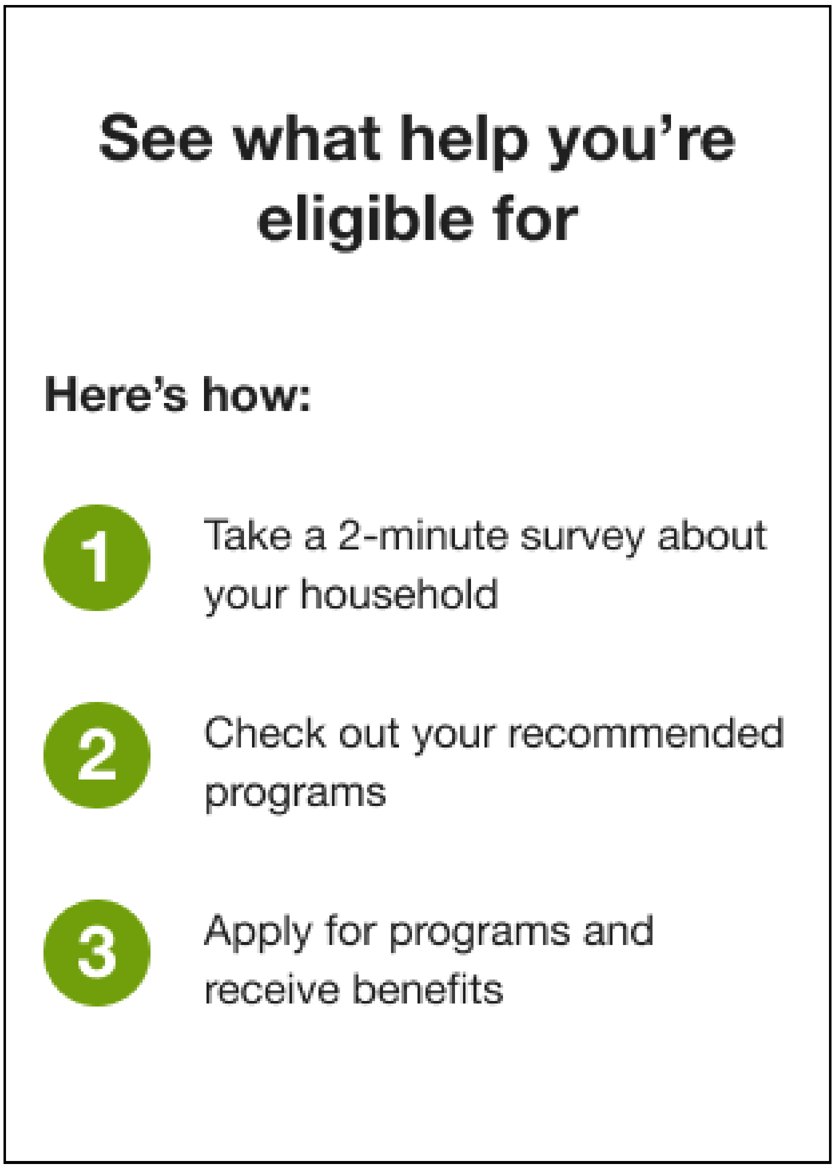
The requirements and limitations for this module are listed in Requirements and Limitations.

User Experience

The user experience for the Numbered Steps module in Billing Triggered Alerts includes the following components:

- **Header**: The header prepares the customer to learn what help they are eligible for.
- **Step 1**: Tells the customer to take the household survey.
- **Step 2**: Tells the customer to get informed on the programs recommended for them.
- **Step 3**: Encourages the customer to apply for programs.

The following is an example of the Numbered Steps module for Billing Triggered Alerts:



Numbered Steps Variations

The user experience for the Numbered Steps module in Billing Triggered Alerts varies depending on the status of the customer's Savings Hub survey.

Unstarted Survey

When the customer has not yet accessed to the Savings Hub survey, the header in this module tells the customer to check out the programs they are eligible for, but does not mention Savings Hub explicitly.

In Progress Survey

Once the customer has already started, but not yet completed, the Savings Hub survey, the header in this module makes explicit mention of the survey, and the text for the first step encourages the customer to complete it.

Savings Hub Call to Action

The Savings Hub Call to Action module for Billing Triggered Alerts is meant to inspire customers to take action towards finding financial assistance through the Savings Hub survey.

Requirements and Limitations

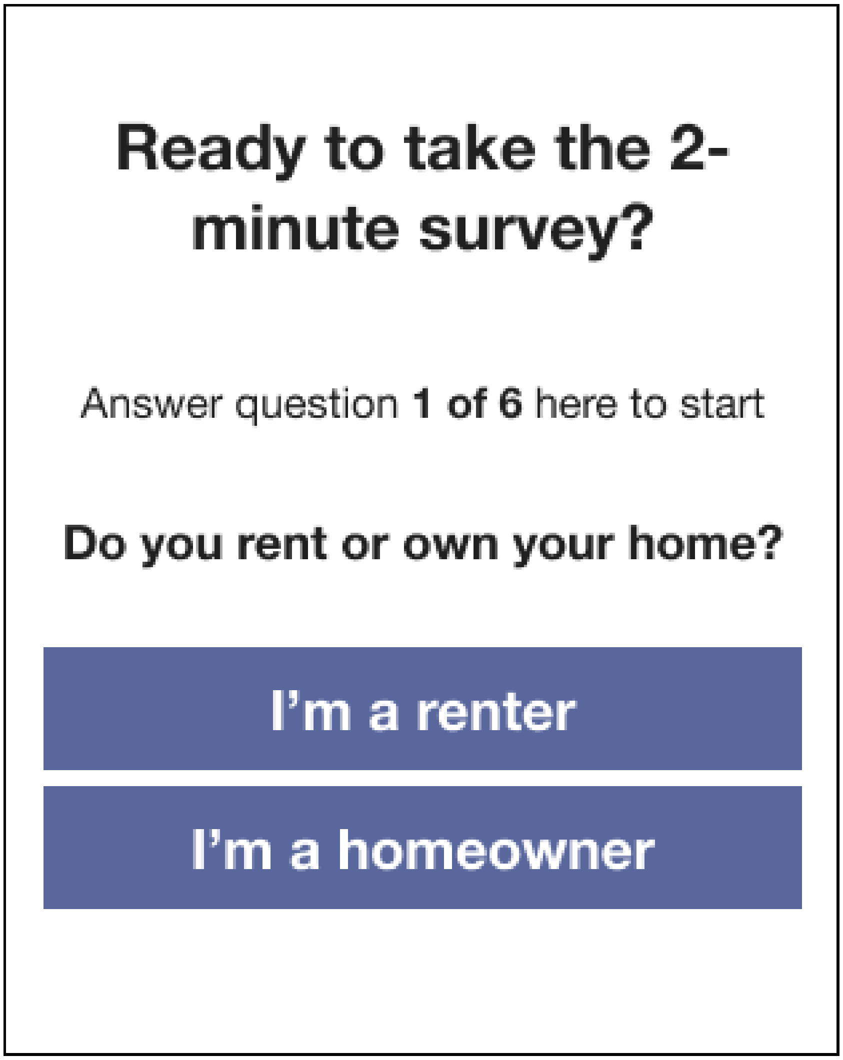
The requirements for this module are listed in Requirements and Limitations.

User Experience

The user experience for the Savings Hub Call to Action module in Billing Triggered Alerts includes the following components:

- **Header**: Asks the customer if they are ready to take the survey.
- **Subheader**: Marks the beginning of the survey, and tells the customer the number of questions in the survey.
- **Survey's First Question**: The module previews the survey's first question.
- **First Question Options**: Answering options appear below the survey's first question. When the customer answers, they're taken to the rest of the survey.

The following is an example of the Savings Hub Call to Action module in Billing Triggered Alerts:



Savings Hub Call to Action Variations

The Savings Hub Call to Action module varies depending on season.

Winter Version

- **Header**: [Customer's first name], keep your bills affordable and stay cozy this winter
- **Background Image**: Winter street scene

Summer Version

- **Header**: [Customer's first name], keep your bills affordable and stay cool this summer
- **Background Image**: Summer street scene

Programs Overview

The Programs Overview module for Billing Triggered Alerts offers additional information about the type of financial assistance available through the Savings Hub.

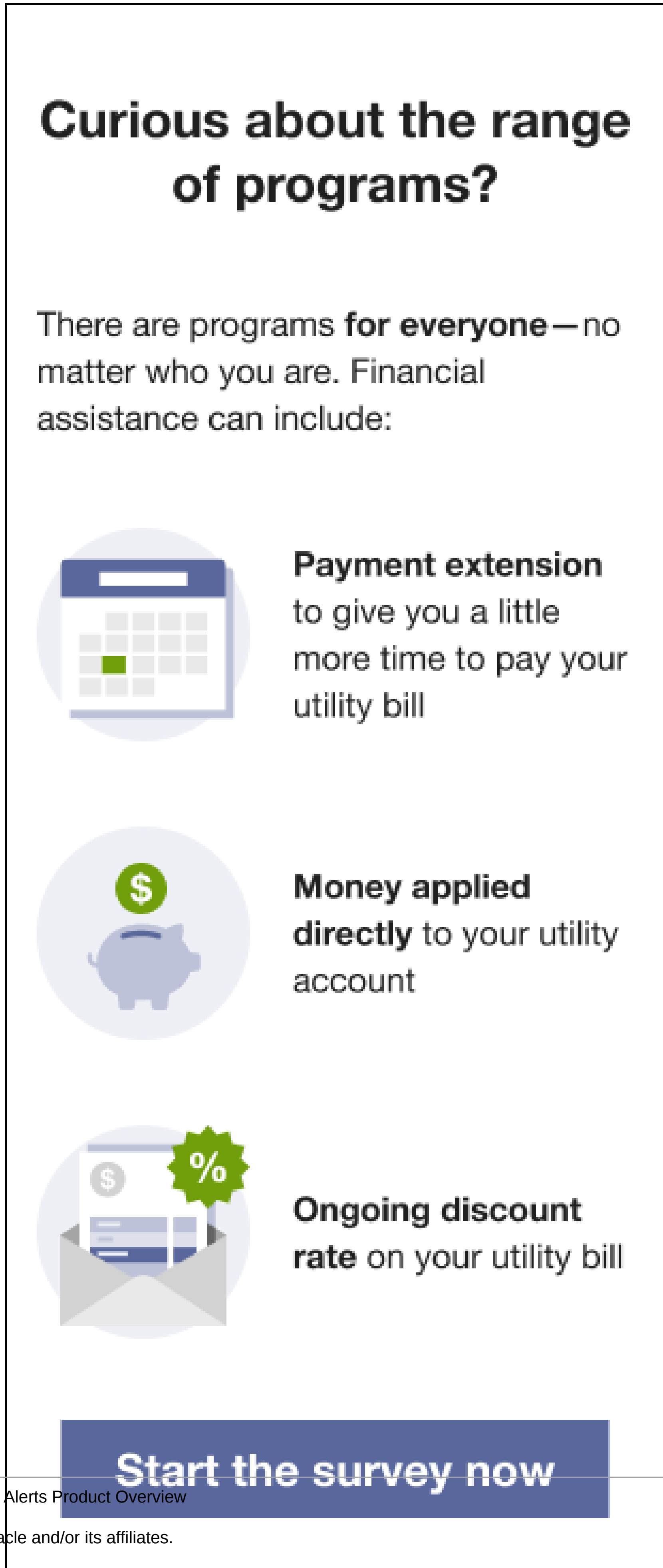
Requirements and Limitations

The requirements for this module are listed in Requirements and Limitations.

User Experience

Customers who have not started the Savings Hub survey get the standard user experience for the Programs Overview module, which includes different types of financial assistance that a customer may receive, and a **Start Survey** button.

The following is an example of the Programs Overview module for Billing Triggered Alerts:


Curious about the range of programs?
There are programs for everyone—no matter who you are. Financial assistance can include:
Payment extension to give you a little more time to pay your utility bill
$
Money applied directly to your utility account
%
$
Ongoing discount rate on your utility bill
Start the survey now

Resources

The Resources module in Billing Triggered Alerts points the customer to additional help and resources outside of the utility, state, and federal program assistance included in the Savings Hub. These resources are especially helpful for customers who have exhausted their options with program assistance.

Requirements and Limitations

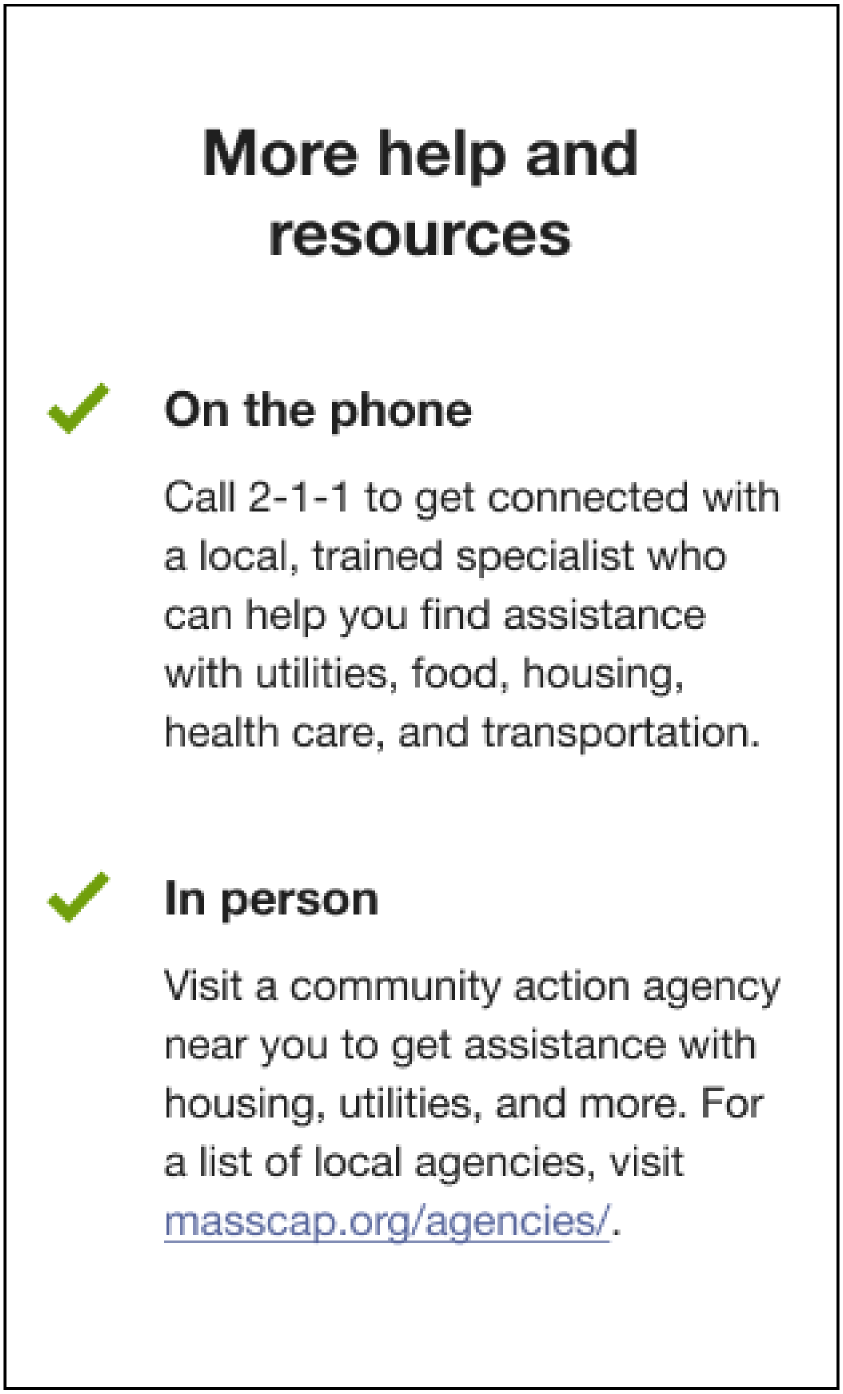
The requirements for this module are listed in Requirements and Limitations.

User Experience

The Resources module points to additional help and resources that could help customers who have exhausted their financial assistance options. In Billing Triggered Alerts, this module appears near the end of the email communication, and provides the customer with two points of contact that can be approached for further assistance.

The default experience for this module includes the phone contact to get to a local specialist that can help find assistance, as well as a link to access a list of local agencies.

The following is an example of the Resources module for Billing Triggered Alerts:

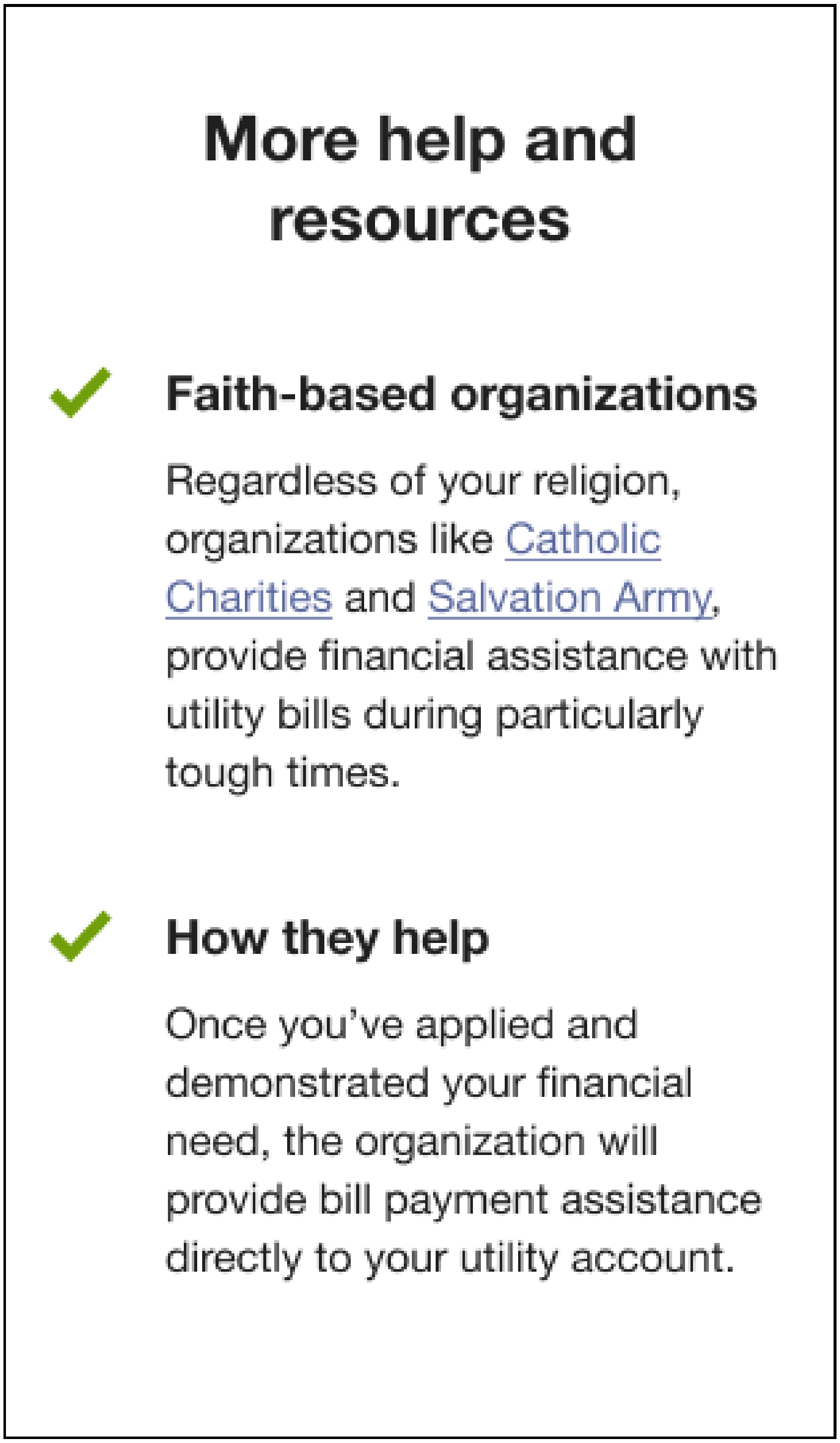


Resources Variations

The customer can opt for either the default user experience, or a variation, for example:

Faith-Based Organizations Variant

In this alternate experience of the Resources module, the points of contact provided are Catholic Charities, and the Salvation Army. The message contains useful links for both, as well as a brief description of how these organizations can provide financial assistance.



Programs List

Based on the Savings Hub survey results, the Programs List module in Billing Triggered Alerts shows the customer their top program recommendations.

Requirements and Limitations

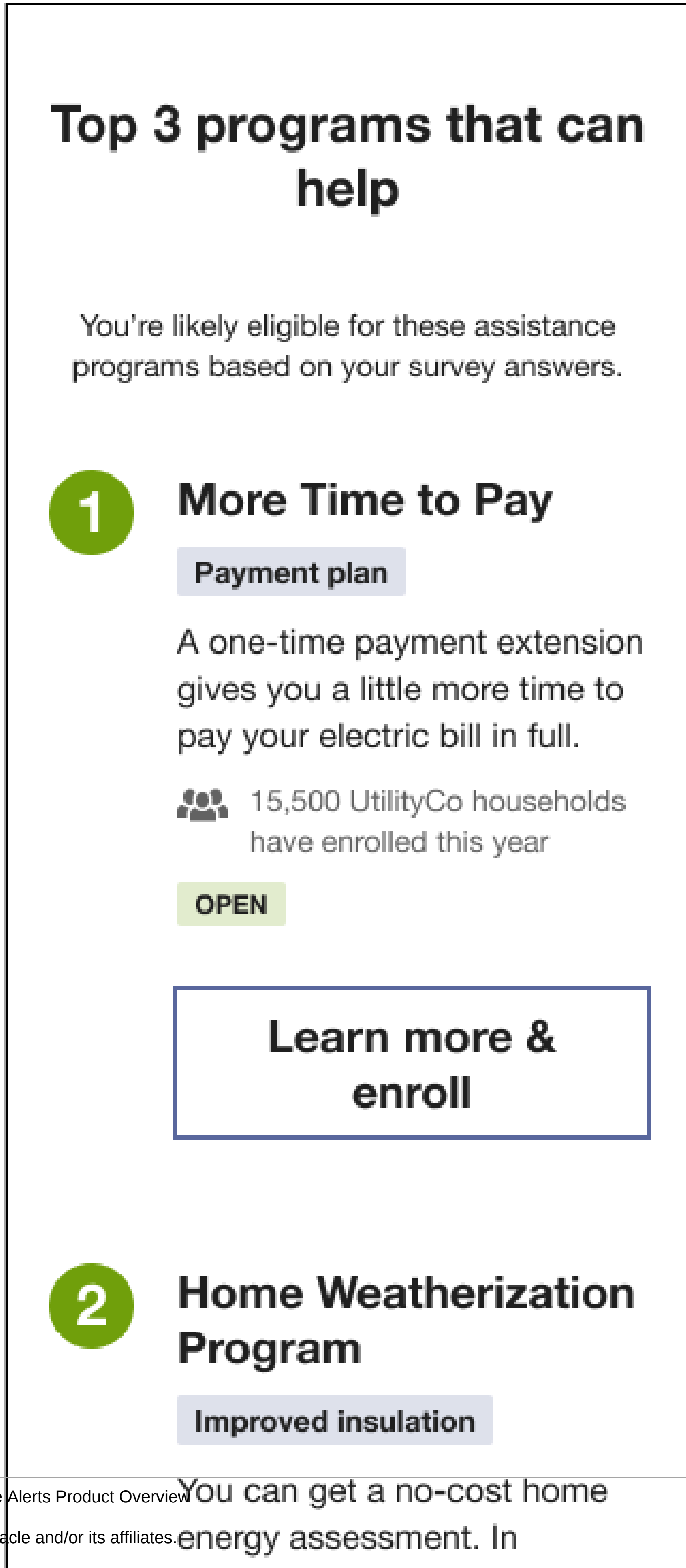
The requirements for this module are listed in Requirements and Limitations.

User Experience

The Programs List module appears only when a customer that is late on their bill completes their Savings Hub survey.

This module shows the customer the top three programs that are recommended for them based on their Savings Hub survey results. Each one of the listed programs has their own call-to-action button that links to the Savings Hub, specifically to that program’s Program Details page.

The following is an example of the Programs List module in Billing Triggered Alerts:


Top 3 programs that can help
You're likely eligible for these assistance programs based on your survey answers.
1
More Time to Pay
Payment plan
A one-time payment extension gives you a little more time to pay your electric bill in full.
15,500 UtilityCo households have enrolled this year
OPEN
Learn more & enroll
2
Home Weatherization Program
Improved insulation
You can get a no-cost home energy assessment. In

Programs List Variations

The experience of this module varies from customer to customer depending on their Savings Hub survey results, and shows up to three programs.

5

Enrollment

The following describes the customer enrollment options available for Affordability Proactive Alerts.

Email Alerts: Customers are automatically enrolled, as long as they meet the eligibility criteria.

6

Alert Delivery

Email alerts are delivered according to specific rules and within a particular delivery window.

Waking Hours: Affordability Proactive Alerts are delivered during waking hours in a utility-specific delivery window.

Days of the Week: Affordability Proactive Alerts are delivered on weekdays and weekends during waking hours.

Delivery Window: Affordability Proactive Alerts are sent on an ad-hoc basis, when the utility schedules the Affordability general alert.

7

Customer Service Interface - Program Management

The Affordability Proactive Alerts cloud service includes access to Customer Service Interface - Program Management. The Customer Service Interface (CSI) is an online support tool that provides utility support staff with the information and functionality they need to manage the Oracle Utilities Opower program and answer customer questions. See the Oracle Utilities Opower Customer Service Interface - Program Management Product Overview for details.

8

Contact Your Delivery Team

Your Oracle Delivery Team is the group responsible for setting up, configuring, launching, or expanding your Oracle Utilities Opower program. Contact your Delivery Team if you have any questions about your program products and implementation.

To contact your Delivery Team:

1. Sign in to Inside Opower (https://inside.opower.com). This is your portal for questions and information related to your program.
2. Go to the Community tab to see who is on your Delivery Team.
3. Contact any of the team members using the information provided.

If you need to report an issue or get technical support, contact My Oracle Support.