Oracle Utilities Opower Customer Service Interface

Oracle Utilities Opower Customer Service Documentation

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Oracle Utilities Opower Customer Service Documentation

Welcome to the Oracle Utilities Opower documentation for Customer Service Representatives. Use this information to learn about the Oracle Utilities Opower program and complete common customer support tasks. Have a question? Contact your supervisor or visit My Oracle Support.

Getting Started

- Program Overview
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Getting Started

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. It allows Customer Service Representatives (CSRs) to find customer accounts, view customer settings, and manage customer preferences.

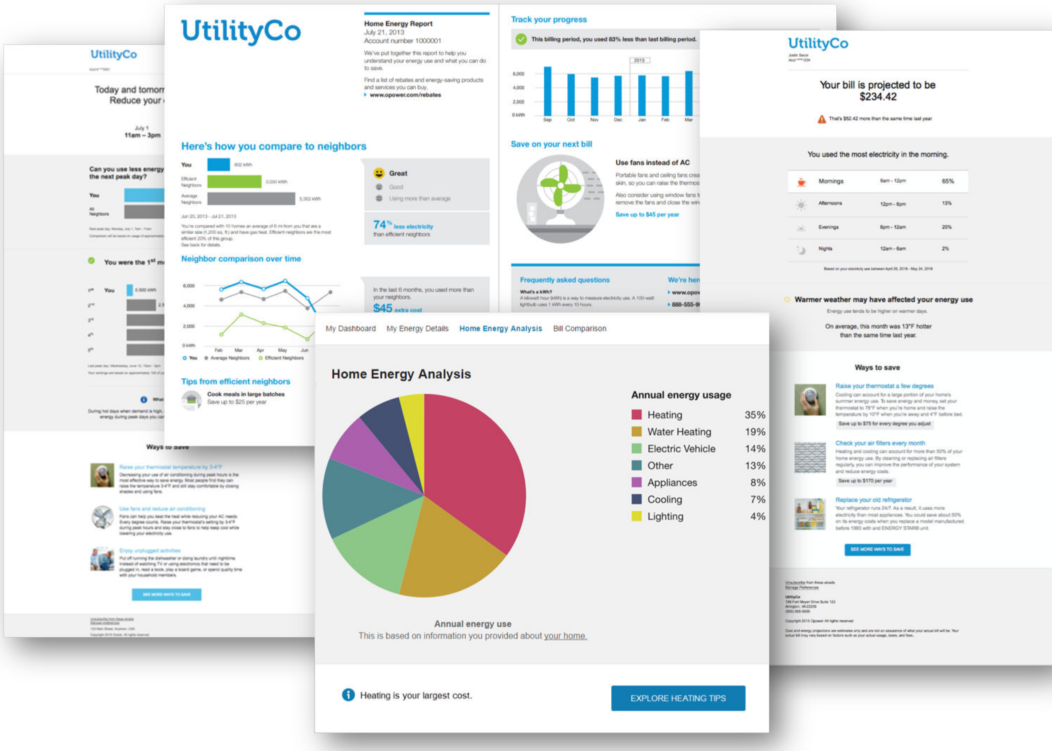
The CSI may include an additional tab called Bill Advisor, which contains special insights to help CSRs resolve high-bill inquiries. This feature is sold separately and is not displayed by default. See Bill Advisor User Guide for more information. If you are unsure whether your utility has this feature, ask your supervisor.

Here are some tasks to get you started with supporting the Oracle Utilities Opower program:

- **Learn about the purpose of the program**. The Oracle Utilities Opower program was founded on a simple premise: it is time to engage the millions of people who are in the dark about their energy use. See Program Overview.
- **Get answers to common customer concerns**. Review the top concerns that customers express when using Oracle Utilities Opower products and services. See Frequently-Asked Questions (FAQs) .
- **Review some good response tactics**. Read these tips on how to deal with frustrated customers. See Response Tactics.
- **Learn about the Customer Service Interface**. The Customer Service Interface includes standard features for customer search, troubleshooting, and preference management. An administrator may assign you to one or more user roles, which determine your level of access to the system. See CSI User Guide and CSI Admin Guide.

Program Overview

The Oracle Utilities Opower program delivers print and digital communications, interactive web features, and behavioral insights that motivate utility customers to save energy on a large scale. This is done by driving behavioral change through the use of relevant behavioral science principles, such as social proof (people tend to do things they see other people doing) and loss aversion (people tend to prefer avoiding losses to acquiring gains).



By incorporating principles like these into the visual design, alerts, and messaging of our products, we have found that utility customers are more likely to pay attention to the communications we send and take action to reduce their energy usage.

As customers receive and digest the information through the products we offer, they may need to contact Customer Service Representatives (CSRs) at their utility to ask questions about the program and get help understanding their insights. CSRs should therefore understand as much as possible about Oracle Utilities Opower products so that they can respond to customer questions quickly and effectively.

To learn more about the individual products and cloud services, go to Oracle Utilities Documentation and select the link for the applicable cloud service. Each link leads to a documentation library with detailed product information. You can also find more information at Product-Specific Support.

Response Tactics

Customers may contact their utility to express frustration about the Oracle Utilities Opower program for any number of reasons. For example, they may think they are being judged too harshly or shamed into saving energy. They may also have legitimate reasons for thinking that the program does not take into account their unique situation. Below are a few strategies that may be effective when dealing with upset customers.

- Re-articulate the purpose of the program.
- Use emotionally-neutral language.
- Validate special circumstances.
- Check their profile information.
- Ask for constructive feedback.

Re-articulate the purpose of the program. Make sure that customers understand that the purpose of the program is to help them. Let them know program participants have been proven to save energy and money, and you want to help them do the same. For more background information, see Program Overview.

Example

Customer: Can I opt out of the program?

CSR: Yes. The Oracle Utilities Opower program is provided to help you understand your home energy use, save energy, and lower your bills. However, if you would like to opt out, you may be able to do so in the account settings section of the web portal. I can also help you manage some of your preferences over the phone.

Use emotionally neutral language. If a customer feels judged, shamed, or personally attacked by some aspect of the program, use neutral words to reframe the conversation. Apologize by saying “offending you was not our intent” and let them know that the intent of the program is to provide education, context, and a comparison that will give them a realistic idea of how much they can save.

Example

Customer: Why are you trying to shame me?

CSR: We are not trying to shame or judge you. If we have offended you, it was not our intent. Rather, we hope that the information we provide can offer valuable insights and context about your home’s energy use so that you can save energy and money. We have joined other cities and utilities across the country to provide these reports because they have been proven to help households effectively save.

Validate their special circumstances, if appropriate. If a customer feels that the neighbor comparison is unfair because of unique circumstances (such as a high number of occupants, someone who works at home, or an energy-intensive hobby), let them know that these circumstances probably are affecting how they compare to their neighbors, but that the program can still be a useful informational tool and allow for measurement of one’s own performance over time.

Example

Customer: I have special circumstances. Why don't you take these into account for the neighbor comparison?

CSR: We do take some special circumstances into account based on information in your home profile. For example, we can account for what type of heating you use. But there are a few reasons why we can’t take all special household characteristics into account for the neighbor comparison. (**Note**: See Neighbor FAQs - Special Circumstances for more information.)

Check their profile information. Shift the focus of a tough conversation to something constructive by asking to confirm that we have the correct profile information for them. Customers are likely to be appreciative that you’re helping to provide them with quality, personalized information. For more information about customer profiles, see Updating a Customer's Home Profile.

Example

Customer: How can I update information about my household to improve the accuracy of my neighbor comparison?

CSR: There are several ways to update your household’s profile information. If you have access to the web portal, you can take the Home Energy Analysis to tell us more about your home and see the most relevant tips for your home. You can update your information in the account settings area of the web portal. These changes may impact the tips you see and/or how you compare to your neighbors in your next report. To see your updated information more quickly, you can visit the web portal after your next billing cycle. I can also help you update your profile.

Ask for constructive feedback. Another way to shift the focus of the conversation is to ask for constructive feedback. Ask the customer how they would like to see the program changed, and then provide that information back to Oracle Utilities. We are always improving our products and appreciate the feedback.

Example

Customer: The neighbor comparison is unfair and doesn't account for my unique situation.

CSR: Thanks for your feedback. Is there anything you would change about the feature so that it would be more helpful or useful?

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Frequently-Asked Questions (FAQs)

This section lists and categorizes frequently asked questions about the Oracle Utilities Opower program.

Program FAQs

- What is the purpose of the program?
- How was I selected to be a part of this program?
- Can I opt out of this program?
- Why am I not getting a communication even though my preference for it is set?

What is the purpose of the program?

Most people are eager to make their home more efficient and save money, but they're not always sure how. The purpose of program is to provide more information about your energy so you can make informed choices, get tips on how to lower your usage, avoid a high energy bill, and save money. We also want to give you tools to see your energy patterns over time and identify what consumes the most energy in your home. We welcome your feedback.

How was I selected to be a part of this program?

Different utilities have different goals, and so they may select program participants in different ways. Some utilities select all eligible customers in a service area. Other utilities select a random subset of eligible customers. Either way, the goal is to help you understand your energy use and lower your bill.

> **Note**
>
> Your utility may want you to emphasize a specific method for how customers were selected. Check with your supervisor for more information.

Can I opt out of this program?

Yes. The Oracle Utilities Opower program is provided to help you understand your home energy use, save energy, and lower your bills. However, if you would like to opt out, you may be able to do so in the account settings section of the web portal. I can also help you manage some of your preferences over the phone.

> **Note**
>
> See Managing a Customer's Preferences for instructions on how to opt a customer out of a product.

Why am I not getting a communication even though my preference for it is set?

Each communication has specific eligibility requirements. For example, some communications require smart meter data or a minimum number of historical bills. If you do not meet these criteria, you will be unable to receive the communication even though your preference for it is set. Let me check to see if this is the case.

> **Note**
>
> The eligibility requirements for each communication vary by utility. If you need eligibility details, ask your supervisor or Contact Oracle Utilities Opower support.

Normative Comparison FAQs

- Why are you comparing me to my neighbors?
- How did you select my neighbors?
- Why are you trying to make me feel bad?
- I have special circumstances. Why don't you take these into account?
- How do you know the comparisons are valid?
- How can I improve the accuracy of my neighbor comparison?
- Are you comparing me to customers at other utilities?
- What is the difference between neighbors and similar homes?

> **Note**
>
> Depending on each utility's setup and configuration, customers may see "similar homes" terminology in the user interface instead of "neighbor comparison" terminology. Utilities can choose to use one type of terminology or the other based on how they think their customers will react to Oracle Utilities Opower products.

Why are you comparing me to my neighbors?

We are joining other utilities and cities across the country to provide this information because it has been proven to effectively help customers save energy and money. We compare your energy use to the use of similar size homes that are close to yours and use the same heating fuel. We do this to provide you with education and context, and to offer an idea of what you could realistically save.

How did you select my neighbors?

Our goal is to provide you with a comparison that is valid and meaningful. We compare your household to other real households in your area, not a theoretical home with similar characteristics.

To provide valid comparisons, we've chosen specific homes with characteristics that typically lead to similar energy needs, such as home size, heating source, and dwelling type. Most importantly, we only include homes that appear to be occupied at the time of the neighbor comparison.

Why are you trying to make me feel bad?

We are not trying to shame or judge you. If we have offended you, it was not our intent. Rather, we hope that the information we provide can offer valuable insights and context about your home's energy use so that you can save energy and money. We have joined other cities and utilities across the country to provide these reports because they have been proven to help households effectively save.

I have special circumstances. Why don't you take these into account?

We do take some special circumstances into account based on information in your home profile. For example, we can account for what type of heating you use. But there are a few reasons why we can't take all special household characteristics into account for the neighbor comparison.

We can only compare your usage based on what we know about you and your neighbors. We base your comparison on reliable data that is gathered for households in your area. However, a variety of lifestyle choices and household changes don't have a system of record. For example, we don't have a way of knowing if you have guests visiting, work from home regularly, or just bought new windows. For this reason, we base your comparison on the major, known factors that drive energy consumption.

Some attributes are not a good basis for comparison. For example, you might wonder why we don't compare your home to only homes of a similar age. Similarly aged homes don't necessarily have similar energy needs. Older homes may typically be less efficient, but they are also more likely to have been renovated. New homes may be more efficient in some ways, but they may have more features that use energy (jetted spas, heated floors, central AC, and other similar types of features).

We want the comparison to be meaningful. We hope that the neighbor comparison can offer valuable information and context about your home's energy use so that you can save energy and money.

Even without taking into account everything that's special about your circumstances, the program can still be a useful informational tool and allow for measurement of your own performance over time.

How do you know the comparisons are valid?

Our comparisons include 100 similar, nearby, occupied homes. Our research shows that for almost all residents, this 100-home average indicates typical usage.

How can I improve the accuracy of my neighbor comparison?

There are a few ways you can improve the accuracy of your neighbor comparison. You can take a Home Energy Analysis survey to tell us more about your home. The answers you provide may impact the tips you see and/or how you compare to your neighbors. I can also help you update your profile.

> **Note**
>
> Depending on your utility's setup and configuration, your customers may not have access to the Home Energy Analysis. In such cases you should still be able to make basic changes to a customer's home information. See Updating a Customer's Home Profile for details. Contact your supervisor if you have any questions.

Are you comparing me to customers at other utilities?

No, you are only compared to other customers in your utility.

What is the difference between neighbors and similar homes?

Depending on each utility's setup and configuration, customers may see "similar homes" terminology in the user interface instead of "neighbor comparison" terminology. Utilities can choose to use one type of terminology or the other based on how they think their customers will react to Oracle Utilities Opower products.

The table below gives a few examples of how and where such differences in terminology may appear. The variation is most likely to appear in features that compare a customer's energy use against that of other customers.

Product or Feature	Terminology
Neighbor comparison in print or email Home Energy Reports	*Neighbor comparison*: "8% less electricity than efficient neighbors." *Similar homes*: "8% less electricity than efficient similar homes."
Neighbor comparison in the Oracle Utilities Opower web portal.	*Neighbor comparison*: "Who are my neighbors?" *Similar homes*: "What homes are compared?"

These variations are not extensive and only appear in a few places. If you are not sure which variation is used by your utility, check with your supervisor.

Efficiency FAQs

- I just invested in an energy efficient appliance or weatherization, why hasn’t my comparison improved?
- Are there inexpensive ways that I can improve the energy efficiency of my home?
- How can my efficient neighbors manage to use so much less energy than me?
- Why does it look like I'm doing so much worse this year in my personal comparison?
- How is my Energy Index calculated?
- Where can I learn more about energy efficiency?

I just invested in an energy efficient appliance or weatherization, so why hasn't my neighbor comparison improved?

If you just made improvements to your home or upgrades to your appliances, it may take a few billing cycles before you are able to see the improvement in your energy usage trends. If you aren't seeing improvement after several months, consider a home audit. An auditor can make sure that you are getting the most out of your new investments, and that everything was installed properly.

Are there inexpensive ways that I can improve the energy efficiency of my home?

Absolutely. There are a wide variety of low cost and no cost actions that you can take to save energy and money in your home. You can view all of our tips, including a whole category of free actions, in the **Ways to Save** section of our customer Oracle Utilities Opower web portal.

How can my efficient neighbors manage to use so much less energy than me?

Efficient households likely take a variety of steps to reduce their energy use, including using the thermostat to manage heating and cooling costs, turning off lights and electronics when not in use, and always running full loads in the dishwasher, washer, and dryer. The Home Energy Reports and Oracle Utilities Opower web portal provide steps that you can take to help you make your home more efficient.

Why does it look like I'm doing so much worse this year in my personal comparison?

There are many factors that affect your personal comparison including the unusual length and temperature ranges of winter or summer. However, temperature is not the only factor to use when looking at your personal comparison. Just like there are many factors that affect your personal comparison, there are many things you can do to save energy and money.

How is my Energy Index calculated?

The Energy Index used in dual fuel reports is a price-weighted index. Because electricity is usually more expensive per unit of energy than natural gas, the price is adjusted before combining them into one unit. This keeps the proportional contributions to the overall combined unit roughly in line with your bills. The calculation uses residential electricity and gas sales numbers to arrive at the price-weighted index.

Where can I learn more about energy efficiency?

You can view more energy efficiency tips on the Oracle Utilities Opower web portal. There are a variety of energy efficiency tips you can browse and add to an energy-savings plan. Also, on the web portal, you may be able to update or complete your home profile in order to get more relevant tips for your home. If your utility is in the United States, the U.S. Department of Energy and the American Council for an Energy Efficient Economy are also good, independent resources for additional information on energy savings. If your utility is not in the United States, consider searching for the web site of a non-profit or government organization that works in the energy industry and is specific to your country. Such organizations typically have information and advice on how you can improve your energy efficiency.

Disaggregation FAQs

These FAQs relate to report modules which display "disaggregation" insights, or insights about how a customer's total energy use is broken down into specific categories such as heating, cooling, or lighting.

For example, the Disaggregation Main Insight module (print version, email version) and the What Uses Most module (print version, email version) both contain disaggregation insights. Customers may wonder about where these insights come from or how they are generated.

- How do you calculate my energy use for each category?
- The value for X category looks incorrect. How was it calculated?
- How can these values be more accurate?
- Will this breakdown impact my bill in any way?
- What appliance usage values can be identified using smart meter data?
- How soon will I see changes after you or I make an update?
- How many appliances can be included in the breakdown?

How do you calculate my energy use for each category?

The calculation varies depending on whether or not you have a smart meter.

- **If you don't have a smart meter or reliable smart meter data is not available**: We use a combination of weather data and your historical usage data to get an idea of how energy is being used in your home over time, as well the Energy Analysis survey responses that are personalized to your home. With this information, our data science models can create an estimated breakdown of your usage by category or appliance so that you know where to focus and save.
- **If you do have a smart meter**: We use data from your smart meter, which records your energy use throughout the day, to detect certain appliance usage patterns and get an idea of how energy is being used in your home.

  For example, it is common for a refrigerator to cycle on every 15-20 minutes to reach the desired temperature and then turn off. Our data science models can spot patterns like this from a refrigerator and other common appliances to determine which appliances are being used and when to help estimate per-appliance usage in your home. We then provide an estimated breakdown of your usage by appliance so you know where to focus and save.

The value for X category looks incorrect. How was it calculated?

The value for each category is an estimate based on your past energy use, weather patterns, and your home characteristics.

The goal with the household-level energy breakdown is to provide accurate enough information to help customers make informed decisions about how to best manage their energy and costs. Creating a breakdown that is 100% accurate is exceptionally difficult. We don't have separate meters for individual appliances that would provide us perfectly accurate usage values. We have to make some educated guesses based off the best information we have available.

Should we take a look at the information we have about your home?

Instructions for CSRs:

- See the calculation FAQ above for a detailed explanation you can share about how the breakdown is calculated.
- See the update FAQ below for steps on how to update a customer's information through the Home Energy Analysis survey.

How can these values be more accurate?

All estimates are based on your past energy use, weather patterns, and your home characteristics. The more information we know about your home, the more accurate the estimates will be.

The goal with the household-level energy breakdown is to provide accurate enough information to help customers make informed decisions about how to best manage their energy and costs. Creating a breakdown that is 100% accurate is exceptionally difficult. We don't have separate meters for individual appliances that would provide us perfectly accurate usage values. We have to make some educated guesses based off the best information we have available.

The best way to make your breakdown more accurate is to provide us with more details about your home through the Home Energy Analysis. The Home Energy Analysis is a survey that captures information about the appliances you have in your home and how you use them. You can take the survey on your own if your utility provides it to you. Or I can look at it for you, and we can confirm that the information we have about your home is correct.

Should we take a look at the information that you have on file?

Instructions for CSRs:

Action	Steps
Check the customer's Home Energy Analysis survey.	1. Sign in to the Customer Service Interface. 2. Open the customer's web account. See Accessing a Customer's Web Portal. 3. Once you are in the customer's web account, navigate to the Home Energy Analysis survey. 4. Take the survey, confirm each answer with the customer, and correct any answer that contradicts what the customer doesn't have. For example, if the Home Energy Analysis survey indicates that the customer has a pool, but the customer says they don't have a pool, then update the survey. 5. If there is still no resolution, then file a ticket with Oracle UtilitiesOpower support. See Contacting Oracle Utilities Opower Support.

> **Note**
>
> If your utility offers the Home Energy Analysis survey to customers, then inform the customer that this tool is available for them to review and update periodically to confirm the details are correct. If you're not sure whether your utility offers Home Energy Analysis to customers, contact your supervisor to verify.

My breakdown includes an appliance I don't use. How can I get it removed?

The goal with the household-level energy breakdown is to provide accurate enough information to help customers make informed decisions about how to best manage their energy and costs. Creating a breakdown that is 100% accurate is exceptionally difficult. We don't have separate meters for individual appliances that would provide us perfectly accurate usage values. We have to make some educated guesses based off the best information we have available.

The best way to update your breakdown is to provide us with additional details about your home through the Home Energy Analysis. The Home Energy Analysis is a survey that captures information about the appliances you have in your home and how you use them. You can take the survey on your own if your utility provides it to you. Or I can look at it for you, and we can confirm that the information we have about your home is correct.

Should we take a look at the information that you have on file?

Instructions for CSRs:

- See the calculation FAQ above for a detailed explanation you can share if the customer wants more information about how their breakdown was calculated.
- See the update FAQ above for steps on how to update a customer's information through the Home Energy Analysis survey.

Will this breakdown impact my bill in any way?

No. The information surfaced in the energy use breakdown is for educational purposes only. This information will not be used for bill determination.

What appliance usage values can be identified using smart meter data?

We can determine usage values for the following appliance categories using a smart meter data:

- Water Heating
- Refrigeration
- Oven
- Dishwasher Use
- Laundry
- Electric Vehicle Charging (Level 2 charging only)

For appliances not included in this list, a combination of regional averages and Home Energy Analysis survey responses are used to determine usage values.

> **Note**
>
> Some appliance categories, such as pools and water heaters, require validation through the Home Energy Analysis before we can surface related insights in your reports.

How soon will I see changes after you or I make an update?

After changes are made to your home information, you should see changes in your next report. If you're using the Home Energy Analysis survey tool on the web, then you should see some changes after you finish the survey.

How many appliances can be included in the breakdown?

The list of available appliance categories varies slightly depending on the characteristics of your home.

Scenario	Available Categories
• You only receive electricity from your utility, or you receive both electricity and gas • You have a smart meter recording interval data	• Heating • Cooling • Water Heating • Refrigeration • Oven • Dishwasher Use • Laundry • Electric Vehicle Charging • Lighting • Electronics • Pool
• You only receive electricity from your utility, or you receive both electricity and gas • You have a smart meter recording interval data	• Heating • Cooling • Water Heating • Lighting • Appliances • Electronics • Electric Vehicle • Pool • Other
• Gas-only customer	• Heating • Water Heating • Pool

> **Note**
>
> Some appliance categories, such as pools and water heaters, require validation through the Home Energy Analysis before we can surface related insights in your reports.

Privacy FAQs

Are you sharing my energy use information with my neighbors?

No, your identity is kept completely anonymous. In the case of the neighbor comparison, we use an average of 100 similar homes in your area, but only you can see your own energy use. Many of our customers are finding that this context is very helpful in making decisions about their energy use, and we hope you will find the comparison valuable as well.

Do you use parcel data, and if so, where do you get it?

Yes, we do try to use parcel data (data about a property, such as the size, heating type, and so on) only if it is available, since it helps with the neighbor comparison process.

> **Note**
>
> For example, US locales get parcel data from public data sources such as tax assessor or county records. The nature of parcel data and how it is obtained in your country may differ. Have your supervisor contact Oracle Utilities to find out whether parcel data is being used in the product for your customers and how the parcel data is obtained.

What do you use parcel data for?

Parcel data often includes information about a household size, type of heating system, type of cooling system, and so on. We can use this information to identify other households that are similar to yours.

> **Note**
>
> If you support customers in a non-US locale, the nature of parcel data may be different than in the US. Have your supervisor contact Oracle Utilities to find out whether parcel data is being used in the product for your customers and what type of information the parcel data contains.

Do you report data about me back to the parcel data source?

No, we do not report any information we collect about you to the source of the parcel data.

Product-Specific FAQs

The products in the Oracle Utilities Opower program come with their own frequently-asked questions. See the topics below for details.

- Affordability FAQs
- Behavioral Demand Response FAQs
- Business Customer Engagement Digital Self Service - Energy Management FAQs
- Business Customer Engagement High Bill Alert AMI FAQs
- Business Customer Engagement Weekly Energy Update FAQs
- Customer Education Report FAQs
- Digital Self Service - Energy Management FAQs
- Distributed Energy Resources FAQs
- Email Home Energy Report FAQs
- High Bill Alert AMI FAQs
- High Bill Alerts (non-AMI) FAQs
- Home Energy Reports FAQs
- Load Shifting FAQs
- Peak Time Rebates FAQs
- Weekly Energy Update FAQs

4

CSI User Guide

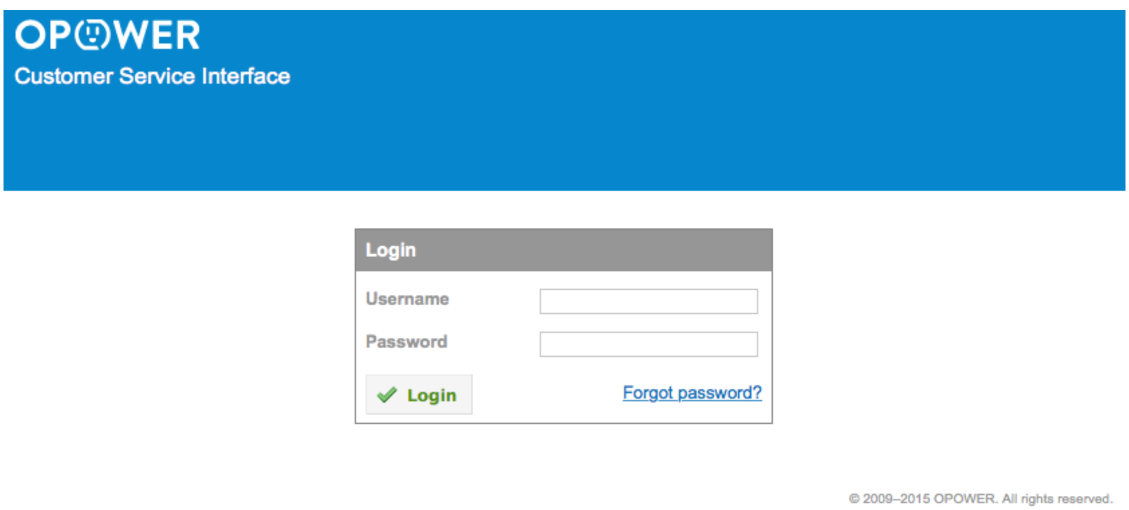
The Customer Service Interface (CSI) is an online support tool that provides utility support staff with the information and functionality they need to manage the Oracle Utilities Opower program and answer customer questions. It allows you to find customer accounts, view customer settings, and manage customer preferences. Depending on each utility's setup and configuration, the CSI may also include a tab called Bill Advisor, which you can use to resolve high-bill inquiries.

Customer Service Interface Feature Overview

The Customer Service Interface includes tools and information for supporting the Oracle Utilities Opower program. A list of the key features is described below. See the product overview for more detailed information about the features, requirements, and limitations of the product.

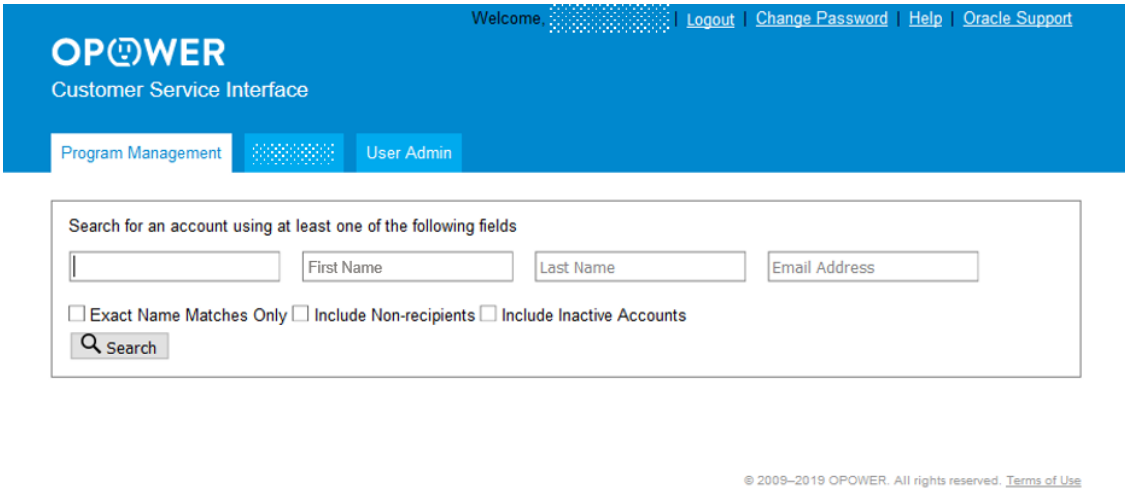
Welcome and Home Page

The Welcome page includes standard fields for authentication and password reset. The Home page includes a search engine and global links that are visible on all pages. See Signing in to the CSI.



Program Management Tab

The Program Management tab includes features for searching customer profiles, managing customer preferences, and accessing a customer's web account to assist with troubleshooting. See Signing in to the CSI.



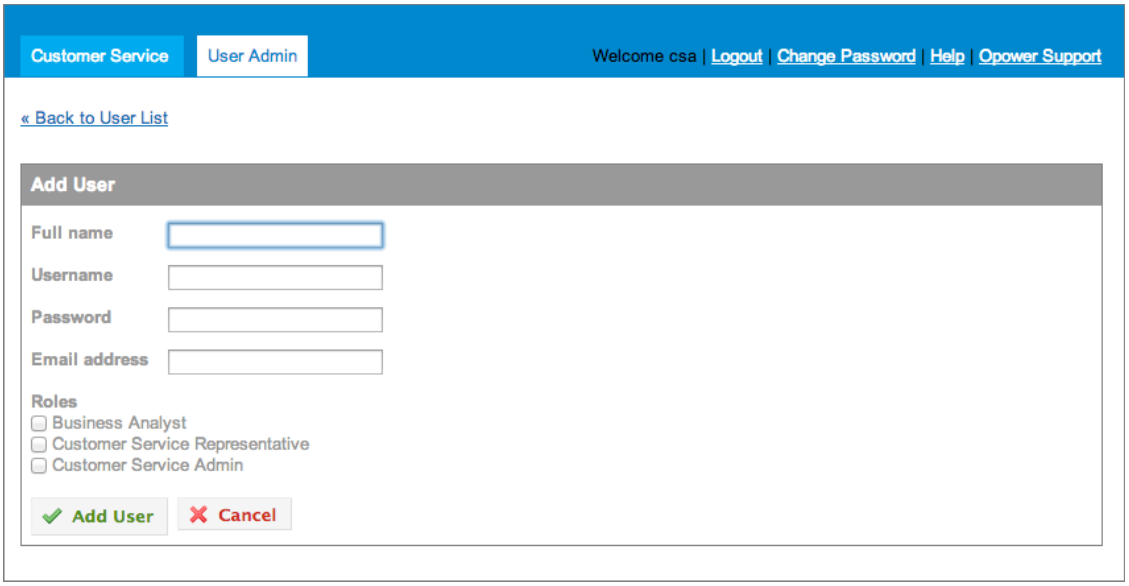
Bill Advisor Tab

The Bill Advisor tab includes features for searching for customer accounts, viewing billing insights, and offering suggestions on how to lower energy use. See [Bill Advisor User Guide](#).

> **Note**
>
> Not all utilities have the Bill Advisor. If you are unsure whether your utility has this feature, ask your supervisor.

User Admin Tab

The User Admin tab includes features for adding and managing users of the Customer Service Interface. See [CSI Admin Guide](#).



Roles and Permissions

Each user's level of access to the CSI depends on their assigned role. A user can be assigned a single role or multiple roles.

Role	Description
Customer Service Representative (CSR)	All functionality in the **Program Management** tab
Customer Service Administrator (CSA)	All functionality in the **Program Management** and **User Admin** tabs
Bill Advisor (if applicable, sold separately from other CSI functionality)	All functionality in the Bill Advisor tab

Signing in to the CSI

The method you use to sign in to the Customer Service Interface (CSI) will depend on whether you have a stand-alone account or single sign-on (SSO). If you are not sure which authentication method you are using, ask your supervisor.

> **Note**
>
> To access the CSI, you will need a link that is specific to your utility. Ask your supervisor for the link if you do not have it yet, and add it to your bookmarks.

Signing in through a Stand-alone Account

If your utility provides you with a stand-alone CSI account, you must create a password for it. Your Customer Service Administrator will give you a link, a username, and temporary password to sign in for the first time. After this, you will be able to create a new password.

To sign in to the CSI through a stand-alone account:

1. Navigate to your utility-specific URL for the CSI. If you do not know the URL, ask your supervisor or Customer Service Administrator for it (often, this is the same person) and add it to your bookmarks.
2. Type in your username and temporary password. If this is the first time you have used the CSI, you will be prompted to create a personal password to replace the temporary one. Password requirements vary by utility, so a message in the tool will let you know if your password does not meet the required criteria.

You have three attempts to sign in before your account is locked. Contact your Customer Service Administrator if you are locked out of your account. Once you have signed in, keep in mind that the system will automatically sign you out after 30 minutes of inactivity. (This time period may be longer depending on your utility's setup and configuration. Contact your supervisor if you have any questions.) See Changing or Resetting Your CSI Password for more information.

Signing in through SSO

If you are using SSO to sign in to the CSI, you can sign in with the existing username and password you have for your utility's web site or customer service portal. Simply sign in to your existing utility account and then navigate directly to the CSI. If you do not know the navigation path, or if you do not have the CSI URL that is specific to your utility, ask your supervisor.

Finding and Opening a Customer's Account

Customers often have questions that can be easily answered by finding and opening their account.

> **Note**
>
> Depending on your utility's setup and configuration, some extra search options may be available.

To find and open a customer's account:

1. Sign in to the Customer Service Interface.
2. Go to the **Program Management** tab.
3. Fill in one or more of the search fields and click **Search**. If the search returns one result, an overview of the customer's account is displayed. If the search returned multiple results, a list of results displays.
4. *Optional*. If you have trouble finding a customer's account, try another search. It is possible the information was entered incorrectly, or the customer may not be in the Oracle Utilities Opower program. Here are some search tips:
   - **If the customer gets a printed Home Energy Report, the best field to search by is the customer’s account number(if available)**. You can ask the customer to find their account number on the upper right of the front page on their Home Energy Report. If the customer has more than one account number, additional search fields allow you to search by any of the account numbers.
   - **If a customer's account number is unavailable, try their first name and/or last name or email address**. You can only search by email address if your utility provides the Oracle Utilities Opower web portal to customers.

- **If you only know part of the customer’s name or account number, perform a wildcard search**. This feature is useful when only a partial query term is available for a given search field. To do this, clear the **Exact Name Matches Only** box before clicking **Search**. Note that a wildcard search cannot be used in the email address field.
- **Understand the "Include Non-recipients" and "Include Inactive Accounts" options**. If you include inactive accounts, a column in the search results will indicate if the account is active. If you include non-recipients, a column will indicate if the customer is a recipient.

5. Review the customer’s basic information in the Now Viewing section and their report delivery details in the Report Delivery Preferences section. These sections provide key information about the customer, including the email address to which outbound communications are sent.

Updating a Customer's Home Profile

If a customer wants to update the information about their home, you can use the Customer Service Interface to make basic changes for them.

> **Note**
>
> The customer can change these and other attributes about their home by taking the Home Energy Analysis survey in the Oracle Utilities Opower web portal.

To update a customer's home profile:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. In the **Profile** area, click **Update Profile**.
4. Update the customer's information.

Task	Instructions
Update the customer's home size.	Enter the appropriate information in the **Square feet** or **Number of bedrooms** area.
Update the customer's spa/sauna information.	Choose the appropriate option from the drop-down menu in the **Spa/Sauna** area.
Update the customer's pool information.	Choose the appropriate option from the drop-down menu in the **Pool** area.
Update the customer's heat type.	Choose the appropriate option from the drop-down menu in the **Heat Type** area.
Update the customer's dwelling type.	Choose the appropriate option from the drop-down menu in the **Dwelling type** area.
Update the customer's solar panels (photovoltaic) information.	Choose the appropriate option from the drop-down menu in the **Solar panels (photovoltaic)** area.
Update the number of adults (18 or over) living in the customer's home.	Choose the appropriate option from the drop-down menu in the **Number of adults (18 or over)** area.
Update the number of children (under 18) living in the customer's home.	Choose the appropriate option from the drop-down menu in the **Number of children (under 18)** area.

5. Click **Update**.

Managing a Customer's Preferences

A customer's preferences are his or her desired settings for reports, alerts, and other aspects of the Oracle Utilities Opower program. In the CSI, you have several options for managing a customer's preferences. In addition, customers can update many of their own preferences in their utility web portal.

- Managing AMI Customer Education Report Preferences
- Managing Business Customer Engagement High Bill Alert AMI Preferences
- Managing Business Customer Engagement Weekly Energy Update Preferences
- Managing Email Home Energy Report Preferences
- Managing High Bill Alert AMI Preferences
- Managing High Bill Alerts (non-AMI) Preferences
- Managing Home Energy Report Preferences
- Managing Load Shifting: Rate Coach Preferences
- Managing Peak Day Communication Preferences
- Managing Weekly Energy Update Preferences

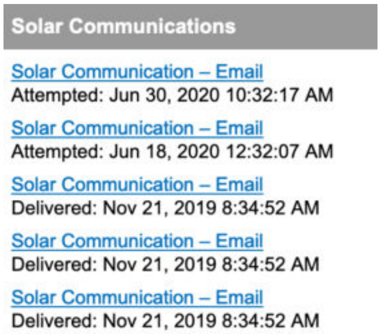
> **Note**
>
> The options available for managing customer preferences may vary depending on your utility's setup and configuration. Contact your supervisor if you have any questions about what is available in your situation.

Viewing a Customer's Sent Communications

Customers in the Oracle Utilities Opower program typically receive one or more communications about their energy use, such as printed reports, email reports, or special alerts sent to their phone or email address. A customer may then call in to the support line and ask about a specific one. To help CSRs respond effectively in such scenarios, the CSI provides tools for viewing copies of the sent communications.

Each communication type that is sent out is displayed in its own section of the portal, and in that section is a list of the sent communications that displays the communication name and type, the date and time the communication was sent, and whether the communication was delivered or attempted (but not successfully delivered).

This image shows an example of the solar communications that were sent to a customer:



To view specific information about viewing sent communications for each product, see the following topics:

- Viewing a Sent AMI Customer Education Report
- Viewing a Sent Load Shifting: Rate Coach Communication
- Viewing a Sent Email Home Energy Report
- Viewing a Sent High Bill Alert AMI Communication
- Viewing a Sent High Bill Alert (non-AMI) Communication
- Viewing a Sent Home Energy Report
- Viewing a Sent Peak Day Communication
- Viewing Sent Solar Communications
- Viewing a Sent Weekly Energy Update

> **Note**
>
> The options available for viewing customer communications may vary depending on your utility's setup and configuration. Moreover, note that sent Behavioral Demand Response communications do not appear in the CSI.

Accessing a Customer's Widgets

Customer Service Representatives with the proper permissions can access a centralized widget gallery to view all embedded Digital Self Service - Energy Management widgets associated with a customer. You can then see and interact with a widget just as a customer would, and more effectively troubleshoot and answer questions.

> **Note**
>
> The widget gallery is only available for utilities that have embedded widgets as part of the Digital Self Service - Energy Management Cloud Service.

To access a customer's widgets:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.

3. On the customer's account page, in the **Actions** area, click **Widget Gallery**. A new tab in your web browser opens.
4. In the **Permissions Confirmation** area, click **Proceed**.
5. Use the navigation to locate the widget you want to view. Depending on your setup configuration, widgets are organized by a single, ordered list, or by page and then widgets on each page.

> **Note**
>
> If you and the customer are viewing a widget at the same time, any changes made are preserved for the last person that completes their updates.

Accessing a Customer's Web Account

Customer Service Representatives with the proper permissions can access a customer's Oracle Utilities web portal account using the Customer Service Interface. When you do this, you can see the web portal much like the customer sees it, and help with questions and troubleshooting. The only restriction is that you cannot modify the customer's email address or password.

To access a customer's Oracle Utilities web portal account:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. On the customer's account page, in the **Actions** area, click **View Customer's Web Account**. A permission confirmation page displays.
4. Ask the customer for permission to view their web account. Once you have permission, click **Proceed**. The customer's web account opens in a new tab.
5. Switch to the new tab to view the customer's web account.

> **Note**
>
> If you and the customer are on the web portal at the same time, any changes made are preserved for the last person that commits their updates.

Changing or Resetting Your CSI Password

You can change your password to the CSI at any time using the **Change Password** link in the CSI tool. If you lose or forget your password, you can request a password reset be sent to your email address registered within the CSI or have a Customer Service Administrator (CSA) reset it for you. If you do not know who the CSA at your organization is, ask your supervisor. If you are a CSA, see Resetting a CSI User's Password.

To change your password:

1. Sign in to the Customer Service Interface.
2. Click the **Change Password** link in the upper-right corner of the page.

3. At the page **Change your password** page that displays, fill in the appropriate fields and click **Change your password**. A message displays confirming that the password has been changed.
4. Click **Proceed**. The home page of the Customer Service Interface displays.

To reset your password:

> **Note**
>
> This task is not applicable to CSI users who log in with single sign-on. See Signing in to the CSI for more information.

1. From the CSI Welcome page, click the **Forgot Password?** link in the lower-right corner of the **Login** dialog. A new web page will appear with a **Forgot Password?** dialog.
2. Type the email address you use to sign in to the CSI.
3. Click **Submit**. A **Password reset** confirmation message will appear, and an email from "Opower Customer Service Interface" is sent to the email address you supplied.
4. Navigate to your email account and open the "Forgot Password" email.
5. Click the appropriate link in the email. A new **Password reset** page is displayed in your Internet browser.
6. Fill in the appropriate fields in the **Password reset** dialog.
7. Click **Submit**. A new web page is displayed confirming your password was successfully reset, and you are redirected to the CSI Welcome page.
8. Fill in your username and new password in the **Login** dialog.

Contacting Oracle Utilities Opower Support

If you face a problem or question that you have trouble addressing, you may need to escalate the issue to the Oracle Utilities Opower Client Support team. This can be done by submitting a case on the Client Support Portal.

> **Note**
>
> Only Program Managers have permissions to submit a support case. Customer Support Representatives must escalate issues to their Program Manager.

To contact support and submit a support case:

1. Sign in to the Customer Service Interface.
2. Click the **Oracle Support** link in the upper right corner of the page.
3. On the page that displays, enter your user name and password.
4. Use the features available to create a new support case.

5 CSI Admin Guide

The CSI *Admin Guide* is designed for Customer Service Administrators (CSAs) at a utility. CSAs are staff members who have access to the **User Admin** tab, which lists all of the existing users of the CSI, along with their email address and role. The list can be filtered based on "Active", "Inactive", and "All users" statuses. CSAs can add new users and edit existing ones.

Adding and Editing CSI Users

Customer Service Administrators (CSAs) can access the **User Admin** page of the CSI tool to add new users and edit existing users.

Adding a New CSI User

To add a new CSI **user:**

1. In the CSI, click the **User Admin** tab. A page with a list of existing CSI users displays.
2. Click the **Add new user** link at the bottom of the page.
3. Fill in the fields on the **Add User** page:
4. - **Full Name**: The user’s full name (with a space between the first and last name).
   - **Username**: A username consisting of the user’s first and last name, but with no space in between.
   - **Password**: A temporary password that is communicated to the user by the CSA. The user will then be prompted to create a new password the next time they log on to the CSI using the temporary password.
   - **Email Address**: The user’s email address.
   - **Roles**: The role(s) assigned to the user. This determines the levels of access available to the user. The role options that appear are dependent on the role of the user accessing the **User Admin** tab.
5. Click **Add User**.

Editing an Existing CSI User

To edit an existing CSI user:

1. In the CSI, click the **User Admin** tab. A page with a list of existing CSI users displays.
2. Click the **Edit** link next to the name of the user whose information you want to edit.
3. Update one or more of the details for the user.
4. - **Full Name**: The user’s full name.
   - **Password**: The user’s login password. Passwords can be reset by typing a temporary password that is communicated to the user by the CSA. The user will then be prompted to create a new password the next time they log in to the CSI using the temporary password. In addition, CSRs have the ability to reset their own passwords

using the **Forgot Password?** link on their utility's designated CSI website. These reset options are not available if the user has accessed the CSI using SSO.

- **Email Address**: The user's current email address.
- **Roles**: The roles assigned to the user. This determines the levels of access available to the user. The role options that appear are dependent on the role of the user accessing the **User Admin** tab.
- **Status**: An indicator of whether the user is active or inactive. Inactive users cannot log in to the system.

5. Click **Edit User**. The page refreshes and your updates are saved, even though there is no confirmation message.

Resetting a CSI User's Password

If a Customer Service Representative (CSR) loses or forgets their password for the CSI tool, a Customer Service Administrator (CSA) can reset their password from the **User Admin** tab of the CSI. CSRs can also reset their own passwords using the CSI. See Changing or Resetting Your CSI Password .

To reset a user's CSI password:

> **Note**
>
> This is *not* the same thing as resetting a customer's password. For security reasons, CSAs do not have permissions to reset a customer's password.

1. Sign in to the Customer Service Interface.
2. Click the **User Admin** tab.
3. Click the **Edit** link next to the name of the person who requires a password reset.
4. In the **Edit User** page that displays, type in a new password in the **Password** field.
5. Click **Edit User** to save the change. The page refreshes to display the user list in the **User Admin** tab.

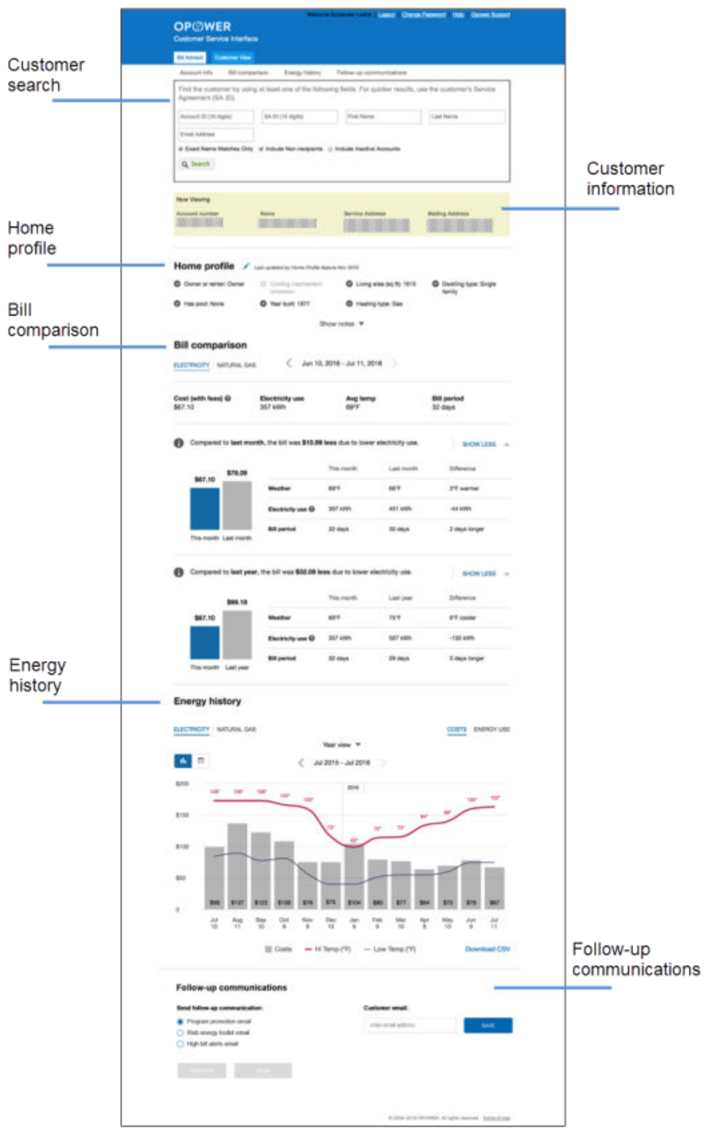
> **Note**
>
> The new password you enter is a temporary password that will be communicated to the user and will expire after seven days. The user will then be prompted to create a new password the next time they log on to the CSI using the temporary password. If the user does not log on using the temporary password within seven days, the user will be unable to log on to CSI. Passwords must comply with any password policies that are in place at your organization.

6

Bill Advisor User Guide

The Bill Advisor tab in the CSI is a set of features and insights that have been specifically designed to help CSRs resolve high-bill inquiries. Bill Advisor lets users search for and view basic customer information, compare a customer's current bill to previous bills, view long-term energy use and weather trends, and send follow-up emails to thank customers for their time.

> **Note**
>
> The features described in this section may not be applicable or available to your utility. They are part of a paid add-on that is not included by default. Contact your supervisor for more information.



See the product overview for detailed information about the features, requirements, and limitations of the product.

Finding and Opening a Customer's Account

The Bill Advisor search tool allows CSRs to find and open a customer's account.

> **Note**
>
> Depending on your utility's setup and configuration, some search options may or may not be available. Contact your supervisor for more information.

To find and open a customer's account:

1. Go to the Bill Advisor tab and use at least one of the search fields and filters. If the customer's account number is unavailable, try the customer's first name, last name or email address.
   - **Account Number**: Account number of the utility customer. This is usually located on the customer's bill.
   - **First Name**: First name of the utility customer.
   - **Last Name**: Last name of the utility customer.
   - **Email Address**: Email address of the utility customer. You can only search by email address if your utility provides the Oracle Utilities Opower web portal to customers.
   - **Exact Name Matches Only**: If this check box is selected, exact searches are enabled. Exact searches require the user to know the full account number, first name, last name, or email address (if applicable) of the customer. By default, the check box for using exact searches is selected.
   - **Include Non-Recipients**: If this check box is selected, Bill Advisor shows all customers at the utility, regardless of whether they receive Home Energy Reports. It is highly recommended that this check box be selected for all Bill Advisor searches because Bill Advisor experiences do not differ between recipients and non-recipients of Home Energy Reports.
   - **Include Inactive Accounts**: If this check box is selected, active and inactive accounts are shown in the results. If this check box is cleared, only customers with at least one active utility account are shown in the search results.
2. Click **Search**.
   - If your search returns one result, an overview of the customer's account is displayed.
   - If your search returns multiple results, a list of results is displayed. Click a row to open the desired account.
   - If no accounts match the information you enter, the message "Your search returned no results" is displayed. Try another search. It is possible the information was entered incorrectly, or the customer may not be in the Oracle Utilities Opower program.

Updating a Customer's Home Profile

If a customer wants to update the information about their home, you can use the Customer Service Interface to make basic changes for them.

> **Note**
>
> The customer can change these and other attributes about their home by taking the Home Energy Analysis survey in the Oracle Utilities Opower web portal.

To update a customer's home profile:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. In the **Profile** area, click **Update Profile**.
4. Update the customer's information.

Task	Instructions
Update the customer's home size.	Enter the appropriate information in the **Square feet** or **Number of bedrooms** area.
Update the customer's spa/sauna information.	Choose the appropriate option from the drop-down menu in the **Spa/Sauna** area.
Update the customer's pool information.	Choose the appropriate option from the drop-down menu in the **Pool** area.
Update the customer's heat type.	Choose the appropriate option from the drop-down menu in the **Heat Type** area.
Update the customer's dwelling type.	Choose the appropriate option from the drop-down menu in the **Dwelling type** area.
Update the customer's solar panels (photovoltaic) information.	Choose the appropriate option from the drop-down menu in the **Solar panels (photovoltaic)** area.
Update the number of adults (18 or over) living in the customer's home.	Choose the appropriate option from the drop-down menu in the **Number of adults (18 or over)** area.
Update the number of children (under 18) living in the customer's home.	Choose the appropriate option from the drop-down menu in the **Number of children (under 18)** area.

5. Click **Update**.

Comparing a Customer's Bills

The **Bill Comparison** module is a component of the Bill Advisor interface that provides CSRs with a concise summary of the customer's bill and how it compares to last month's bill, as well as to the same month's bill of the previous year.

To compare a customer's bill to previous bills:

1. Go to the Bill Advisor tab, and search for and open a customer's account.
2. Navigate to the **Bill comparison** section.
3. Review the customer's current bill at the top of the module, noting energy costs, energy use, weather, and bill period length.
4. Compare the current bill to last month's bill and last year's bill using the summary statements in the bottom half of the module.
5. *Optional*. Do one of the following to get more insights:

- Click one of the links in the module to show more information and perform an in-depth comparison of the customer's bill with a previous bill.
- Use the available tooltip to view a more granular insight about how the customer's average daily energy use differed between the compared bill periods.
- Use the date range at the top of the module to view bills from other months.

Viewing a Customer's Energy History

The **Energy History** module is a component of the Bill Advisor interface that provides CSRs with a user-friendly, interactive view of a customer's energy use costs and trends over time.

To view a customer's energy history:

1. Sign in to the Customer Service Interface.
2. Go to the Bill Advisor tab, and search for and open a customer's account.
3. Navigate to the **Energy history** section.
4. If the customer has dual fuel, click **Electricity** or **Natural Gas** at the top of the chart to view the fuel type of interest.
5. *Optional*. Click the selector at the top of the module to display a graph or table view of the data.
   - **Graph View**: The graph view shows a bar chart of the customer's energy use history on a vertical and horizontal axis. The vertical axis shows cost or energy use amounts, while the horizontal axis shows the interval of time.
   - **Table View**: The table view presents an elegant, consolidated list of billing details about the customer's energy history. The table view includes a series of columns such as date range, read type (estimated or actual), energy costs, and so on.
6. Review the customer's available energy history information, noting energy costs, energy use, weather, and any credits earned or electricity sent to the grid due to solar power.
7. *Optional*. Do one of the following to get more insights:
   - Hover your cursor over one of the bill periods in the module to learn more about the customer's energy use. If the customer has daily or sub-daily data available, click a particular month in the chart to view daily or sub-daily energy and temperature data.
   - Use the date range at the top of the module to view the customer's energy history over various time periods.
8. *Optional*. Click the **CSV Download** link to download a CSV file of the data for further analysis in a software program of your choice, such as Microsoft Excel.

Sending a Follow-Up Email

The **Follow-up Communications** module is a tool in the Bill Advisor that allows CSRs to send an email to a customer after the end of a call. The email thanks the customer for calling and provides brief details about a utility promotion, rebate, or energy-saving tip.

To send a follow-up email:

1. Sign in to the Customer Service Interface.
2. Go to the Bill Advisor tab, and search for and open a customer's account.
3. Navigate to the **Follow Up Communications** section.

4. In the **Customer email** field, add the customer's email address, and click **Save**.
5. Select a template to use for the follow-up email. You can click the **Preview** button to see what it will look like for the customer.

> **Note**
>
> The preview does not include the email subject line. The default subject line is, "Following up on your recent call to <utility name>". However, this language may have been customized for your utility, and there may be a different subject line for each email template. Contact your supervisor if you have any questions.

6. After you have selected the desired template, click **Send**.

7

Product-Specific Support

This section provides FAQs and support procedures related to specific Oracle Utilities Opower products. If you have any questions about which products are included in your program, contact your supervisor.

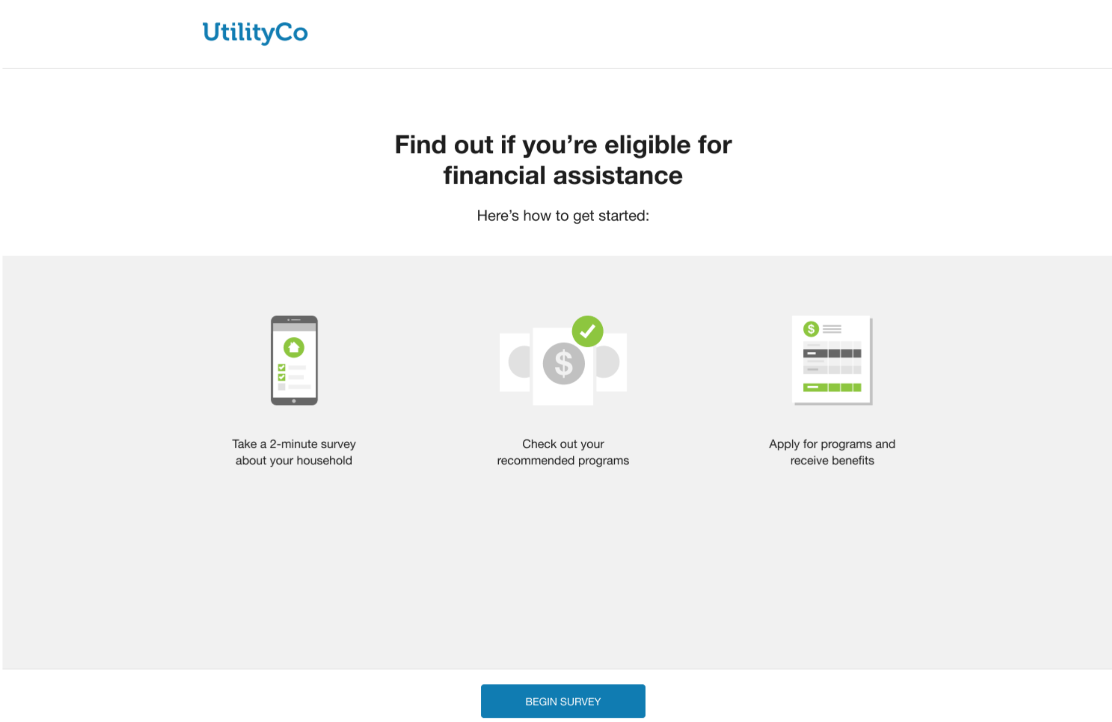
Supporting Affordability Solutions

The Oracle Utilities Opower Affordability Cloud Services provide low- and medium-income utility customers with information about financial assistance programs available from their utility. The services are meant to help customers identify which programs they qualify for, and enroll in a program that is best suited to their financial situation.

Common Support Tasks

- Answer frequently asked questions

See the product overviews for detailed information about the features, requirements, and limitations of the product.



Affordability FAQs

What is the Affordability Savings Hub?

The Affordability Savings Hub is a web tool designed to help you understand and apply for financial assistance programs at your utility and outside assistance agencies. It includes a simple survey that determines what programs you're eligible for, as well as information and links that help you enroll in the program that is right for you.

Why do I need to take a survey?

The survey presents simple questions about your home and finances. With answers to these questions, the tool can automatically determine your eligibility for various programs, and to suggest which ones you should apply to.

Can I re-take the survey after completing it?

Yes. Follow the links available to re-take the survey if necessary.

How can I find out what utility programs I am currently enrolled in?

You can log in to your utility web account to look this up, or I can look it up for you. Note that we may not be able to see all of the programs that you are using, since some of them are not part of the utility.

Will it cost me anything to enroll in one of the programs?

No. Every financial assistance program is available to you for free.

Supporting Business Customer Engagement

The Oracle Utilities Opower Business Customer Engagement solution encompasses the following cloud services:

- The Business Customer Engagement Digital Self Service - Energy Management cloud service, a flexible web experience that provides business customers with personalized energy data, insights, and recommendations on how to save energy. The experience is delivered through modular, mobile responsive widgets that are included in a standalone web portal or embedded in the pages of a utility's web site. See [Supporting Business Customer Engagement Digital Self Service - Energy Management Web Portal].
- The Business Customer Engagement Proactive Alerts cloud service, which includes communications designed to notify business customers if they are on track for a high bill, and educate them about their energy use patterns so they can take action to save money and energy. See [Supporting Business Customer Engagement Proactive Alerts].

Supporting Business Customer Engagement Digital Self Service - Energy Management Web Portal

The Business Customer Engagement Digital Self Service - Energy Management Web Portal is a flexible web experience that provides business customers with personalized energy data, insights, and recommendations on how to save energy. The experience is delivered through modular, mobile responsive widgets that are included in a standalone web portal or embedded in the pages of a utility's web site.

Common Support Tasks

- [Answer frequently asked questions]
- [Access a customer's web portal account]
- [Access a customer's widgets]

See the Business Customer Engagement Digital Self Service - Energy Management Web Portal overview for more information about the features, requirements, and limitations of the product.

Business Customer Engagement Digital Self Service - Energy Management FAQs

What is the purpose of this program?

Most businesses are eager to be more energy efficient and save money, but they're not always sure how. The purpose of the Business Customer Engagement program is to provide more information about your energy use so you can make informed choices and save money. We welcome your feedback.

Can I access my account using my device of choice?

Yes. The features and widgets in the Business Customer Engagement program use a responsive design which allows them to resize automatically for a broad range of device and screen sizes.

How can I access information for a different property I manage?

It depends on whether the information you are viewing is in an embedded widget or part of a standalone web account.

- If you are viewing information in an embedded widget within your utility's website, you can use the account selector menu of the widget to switch between information for different properties.
- If you are logged in to a standalone web account, you must log out and then go to your utility website to switch a different account for a different property.

Why doesn't my bill comparison match up exactly with my bill?

Your bill comparison displays billing data that is sent by your utility to Oracle Utilities Opower. The data sent by your utility may not always include all the information listed in your bill, such as taxes and fees. For this reason, your bill comparison may not match your bill exactly. However, your bill comparison will still show how much you were charged for energy, as well as useful insights about the major reasons for differences between your bills (such as the impact of weather or a difference in the length of the bill period).

How can I reset my password?

> **Note**
>
> If a utility implements single sign-on (SSO) authentication, all password management is handled by the utility's website. The information below is applicable to non-SSO customers who can manage their password from the standalone Business Customer Engagement Digital Self Service - Energy Management web portal. If you are unsure if your utility is using SSO or not, contact your supervisor.

If you have forgotten your password, you can use the **Forgot Password** link from the sign-in page of the web portal. You must provide the email address associated with your web account. An email is sent to this email address, which links to a form to create and confirm a new password.

If you know your current password and want to update it, select the **Account and Preferences** link to access your account options. You can then use the **Login Details** to update your password.

If you try to recover your password but do not receive a password recovery email, then it is possible you have not created an account yet. Follow the steps on the sign-in page to register and create an account if you have not already.

Supporting Business Customer Engagement Proactive Alerts

Business Customer Engagement Proactive Alerts are messages designed to help business customers save energy and money when they are likely to use more than usual for a billing period.

Common Support Tasks

- Answer frequently-asked questions for Business Customer Engagement High Bill Alerts AMI
- Answer frequently-asked questions for Business Customer Engagement Weekly Energy Updates
- Manage Business Customer Engagement High Bill Alerts AMI Preferences
- Manage Business Customer Engagement Weekly Energy Update Preferences

See the Business Customer Engagement Proactive Alerts overview for more information about the features, requirements, and limitations of the product.

Business Customer Engagement High Bill Alert AMI FAQs

Why did you send me this alert?

We hope these alerts can provide an early warning if you are headed towards a high bill. You'll have time to reduce your energy use before you get your next bill, so there will not be any surprises when your bill arrives.

My alert says I am using more energy. How is this being calculated?

We will send you an alert when your energy use and costs are projected to be at least 30% higher than this same billing period last year. We take into account energy use and cost, so you do not get nuisance alerts just because your rate might be higher over time. If you receive an alert, it means you are using more energy.

> **Note**
>
> A value of 30 percent is the default, but this percentage can vary by utility.

I see I need to start saving more energy. What should I do next?

Our utility offers multiple programs to help you save energy. I can help you learn more about these programs. To see energy saving tips on your own, log in to the Business Customer Engagement Digital Self-Service Web Portal and click on the **Ways to Save** tab.

Can I opt out of these alerts?

Yes. You can opt out in a number of ways. The options available will depend on your utility's setup and program design.

From an email: Click the unsubscribe link at the bottom of the email and follow the instructions to opt out.

> **Warning**
>
> If you click **Unsubscribe** in the email and then click to unsubscribe from *all* emails, this action is permanent, and you will not be able to opt back in. If you click to opt out of High Bill Alert AMI emails only, then you can opt back into them at a later time.

From a text alert: Reply STOP to the alert. This method blocks all communications through that specific channel. If you reply with STOP, you will never receive an SMS again.

From a voice alert: Press the appropriate number on your phone as described in the message. This method permanently unsubscribes you from the voice alerts, and you will be unable to subscribe at a later time.

Can I opt back in after I have opted out?

It depends on how you originally opted out.

- If you clicked **Unsubscribe** at the bottom of an email and opted out of *all* emails, you cannot opt back in again. However, if you opted out of High Bill Alert AMI emails only, you can opt back in again.
- If you texted STOP to unsubscribe from a text alert, or dialed a number to unsubscribe from a voice alert, you cannot subscribe again. However, you can always check your energy use in the Business Customer Engagement Digital Self-Service Web Portal. The **Home** page has a module that will notify you how much energy you are projected to use and how this usage compares to the same billing period last year.

What other ways can I find out if I'm heading towards a high bill?

You can receive High Bill Alerts AMI by email, text message, and voice message. I can help you sign up for these types of alerts. You can also check your energy usage in the Business Customer Engagement Digital Self-Service Web Portal. The **Home** page has a module that will tell you how much energy you are projected to use and how this usage compares to the same billing period last year.

My bill was not as high as my alert projected. Why?

Forecasts are estimated projections. Although we try to make them as accurate as possible, we cannot account for every single variable that can affect the final cost of your bill. For example, due to a variable like drastic weather change you may receive a higher projection than your actual bill.

My bill was higher than projected even though I reduced my usage. Why?

Forecasts are estimated projections. Although we try to make them as accurate as possible, they do not include costs like taxes, fees, and any additional changes.

I know someone else in this utility who can receive alerts, but I don't have the option. Why?

Thank you for your interest in the program. There are a number of reasons that some customers are not included in the program. For example, at this time, alerts are not available to customers with a limited history of energy use at a specific address. We may expand the program to include other customers in the future.

If I sign up to receive alerts, how many will I receive?

You should not worry about receiving too many alerts. You will not receive more than one alert of each type (email, text, or voice) during a billing period.

Business Customer Engagement Weekly Energy Update FAQs

Why did you send me this email?

We want to help you save energy and lower your energy bill. You are among a group of business customers included in the Weekly Energy Updates program, which is designed to help meet this goal.

Weekly Energy Updates are designed to provide more information about your energy use on a week-to-week basis so you can plan ahead, make informed choices, and save money. We welcome your feedback. Please let us know if you have comments or suggestions for improvement.

Where can I learn more?

You can view more energy efficiency tips on the Business Customer Engagement Digital Self-Service Web Portal. There are a variety of energy efficiency tips you can browse and add to an energy-savings plan. If your utility is in the United States, the U.S. Department of Energy and the American Council for an Energy Efficient Economy are also good, independent resources for additional information on energy savings. If your utility is not in the United States, consider searching for the web site of a non-profit or government organization that works in the energy industry and is specific to your country. Such organizations typically have information and advice on how you can improve your energy efficiency.

How do you project the usage/cost for the bill period?

The actual usage or cost from the beginning of the current bill period is added to the projected energy use or cost for the rest of the bill period. The most recent usage history is used to project forward.

Does the bill projection take weather into account?

Our algorithm does not explicitly weather normalize or use weather forecasts. However, it does take weather into account in that weather in the recent past is most predictive of what the weather will be in the near future. For example, if it was very hot last week, it is likely to be very hot again this week.

Why is my forecast different in the web portal than it is in the email?

The Business Customer Engagement Digital Self-Service Web Portal may have more recent data. There also may be minor variations due to factors like rounding the numbers of your energy usage or costs.

Why does the bill forecast differ from my actual bill?

Natural variations in weather and usage patterns can easily change your projected usage and bill amounts, but other factors may cause your forecast to differ from your actual bill:

- **Rounding:** We round the forecast to the nearest $5.
- **Taxes, fees, and one-time charges:** We usually do not include taxes, fees, and other charges in the bill forecast.
- **Rate events:** Because peak day events or other event-based rate changes are unpredictable, we do not try to forecast them in our modeling of rates. Missing rate changes in our calculations could cause the forecast to be overestimated or underestimated.
- **Unanticipated changes to rate plan or billing cycle:** If you change rate plans, billing cycles, or have a bill canceled and re-issued, this may cause the forecast to be inaccurate for a temporary period.

How is the email cycle related to my billing cycle?

Weekly cycles and billing cycles are independent of one another. A weekly cycle may contain the end of one billing cycle and the beginning of another.

What period of time is covered by the email?

Weekly cycles begin on Monday at 12:00:00 AM (midnight) and end on Sunday at 11:59:59 PM. This is consistent with how people typically think about weekly events, and allows you to better analyze your weekday usage compared to your weekend usage. The email is sent as close to the end of the weekly cycle as possible.

Can I opt out of this program?

Yes. You can opt out in a number of ways. The options available will depend on your utility's setup and program design.

From the web: The recommended method is to use the Business Customer Engagement Digital Self-Service Web Portal **Account Center** to change your preferences. If you unsubscribe in this way, you will be able to subscribe again in the future.

> **Note**
>
> Some utilities choose to host their own account services. If your utility does not offer the Business Customer Engagement Digital Self-Service Web Portal as part of their program, contact your utility for more information about account management.

From an email: Click the unsubscribe link at the bottom of the email and follow the instructions to opt out.

> **Warning**
>
> If you click **Unsubscribe** in the email and then click to unsubscribe from *all* emails, this action is permanent, and you will not be able to opt back in. If you click to opt out of Weekly Energy Update emails only, you can opt back in at a later time.

Can I opt back in after I have opted out?

It depends on how you opted out. If you clicked to unsubscribe from *all* emails, then you cannot opt back in. If you clicked to opt out of Weekly Energy Update emails only, then you can opt back in again. Follow these steps if you would like to opt back in:

Log in to the Business Customer Engagement Digital Self-Service Web Portal. Click **Account Center** and then look under **Manage recipients and preferences**. Find the individual whose preferences you want to change, and then expand **Message preferences**. In the Weekly Energy Updates area, select the **Email** checkbox and click **Save**.

Managing Business Customer Engagement High Bill Alert AMI Preferences

In the CSI, you have various options to manage communication preferences for your customers. Some options may be hidden depending on which products are provided by your utility. You may also see a message explaining that no communications for a specific type of product are available for a given customer account. Moreover, in some cases, you may be able to manage properties for products the customer is ineligible to receive.

To manage preferences:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. In the **Actions** area, select **Manage Communication Preferences**.
4. Perform one or more of the following actions:

Action	Steps
Update contact information	Click the **Edit contact info** link next to the recipient you want to update, and update the relevant contact information.

Action	Steps
Add a new recipient	Click **Create new recipient** and enter the contact information. A customer can add up to 10 additional recipients. Each recipient must have a name and at least one communication type. **Note** When contact information is added or updated, basic validation is used to ensure that the phone number and email address resemble real values. However, these values are not automatically tested or verified, so it is possible to enter incorrect or inaccurate information, even if it looks correct.
Remove a recipient	Click **Details** next to the recipient you want to remove to display the additional contact information, then click **DELETE CONTACT**. Any recipient other than the primary recipient can be removed.
Update communication channels	In the **High bill alerts** area, update the **Mail** (printed) and **Email** preferences. The **High bill alerts** area is hidden from customers that do not have AMI data. A customer has the option to unsubscribe from voice alerts from the phone when they receive an alert.

Action	Steps
Add communications to a recipient	After you have added a recipient, you can then select the communications and alerts they receive. Click **Details** next to the appropriate recipient to display the additional details. Then, select the check boxes next to each communication you want the recipient to receive. **Note** If a recipient is added for a communication that they are not eligible to receive, then the recipient will not receive it. However, the communication will remain selected in the settings. The eligibility requirements for each communication vary by utility. If you need eligibility details, ask your supervisor or contact My Oracle Support.
Opt out a customer	In the **High bill alerts** area, clear the **Mail** (printed) and **Email** checkboxes. A customer has the option to unsubscribe from voice alerts from the phone when they receive an alert.

Managing Business Customer Engagement Weekly Energy Update Preferences

In the CSI, you have various options to manage communication preferences for your customers. Some options may be hidden depending on which products are provided by your utility. You may also see a message explaining that no communications for a specific type of product are available for a given customer account. Moreover, in some cases, you may be able to manage properties for products the customer is ineligible to receive.

To manage preferences:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. In the **Actions** area, select **Manage Communication Preferences**.
4. Perform one or more of the following actions:

Action	Steps
Update contact information	Click the **Edit contact info** link next to the recipient you want to update, and update the relevant contact information. If your utility is using single sign-on (SSO), the option to edit the email address is not available. In this case, you must instruct the customer to update their email address using the account setting options that your utility provides to customers.
Add a new recipient	Click **Create new recipient** and enter the contact information. A customer can add up to 10 additional recipients. Each recipient must have a name and at least one communication type. **Note** When contact information is added or updated, basic validation is used to ensure that the phone number and email address resemble real values. However, these values are not automatically tested or verified, so it is possible to enter incorrect or inaccurate information, even if it looks correct.
Remove a recipient	Click **Details** next to the recipient you want to remove to display the additional contact information, then click **DELETE CONTACT**. Any recipient other than the primary recipient can be removed.
Update communication channels	In the **Weekly energy updates** area, update the **Email** preference. The **Weekly energy updates** area is hidden from customers that do not have AMI data.

Action	Steps
Add a communication to a recipient	After you have added a recipient, you can then select the communications and alerts they receive. Click **Details** next to the appropriate recipient to display the additional details. Then, select the check boxes next to each communication you want the recipient to receive. **Note** If a recipient is added for a communication that they are not eligible to receive, then the recipient will not receive it. However, the communication will remain selected in the settings. The eligibility requirements for each communication vary by utility. If you need eligibility details, ask your supervisor or contact My Oracle Support.
Opt a customer out	In the **Weekly energy updates** area, clear the **Email** checkbox. Customers can also unsubscribe from the header or footer of email alerts directly.

Supporting Customer Education Reports

Customer Education Reports are print and email communications delivered to customers who recently received an AMI smart meter. They are designed to inform customers about the benefits of their smart meter, provide AMI energy use insights, and encourage customers to engage with other AMI tools and programs offered by the utility.

Common Support Tasks

- Answer frequently asked questions
- Manage Customer Education Report preferences
- View copies of sent Customer Education Reports

See the product overview for more information about the features, requirements, and limitations of the product.

UtilityCo

Jane Johnson
Acct ****1234
1234 Main St.

Your energy meter has been upgraded to a smart meter.

What’s a smart meter?

Smart meters send your energy use to ConEdison in real time—no more manual reads or estimated bills. Learn more

Why smart meters?

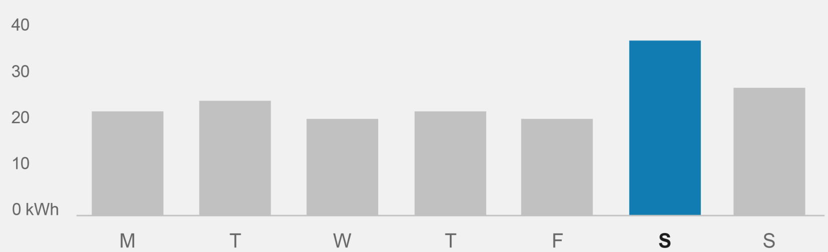
Smart meters allow us to provide more reliable service, faster responses to outages, and greater opportunities to use renew-able energy.

How is this good for me?

You now have access to more personalized data plus special programs like High Bill Alerts to help you better manage your use, which can lead to lower monthly bills.

Your smart meter insights

You used the most electricity on Saturday.



Feb 29, 2016 - Mar 6, 2016

On Saturday, you used the most from 6-9pm.

Customer Education Report FAQs

What is the purpose of this report?

The purpose of the AMI Customer Education Report program is to educate customers who recently received a smart meter about the utility tools, programs, communications, and resources they can use to lower their energy use and save on their bills.

Why did I receive this report?

We want to help you take full advantage of your new smart meter by providing personalized energy use insights. We hope that you will continue to explore your smart meter data by using the tools available to you on the Web Portal and enrolling in utility communications designed for customers with smart meters.

Can I opt out of the program?

You will receive two reports as part of the Customer Education Report program. Due to the short length of the program, you cannot opt out of print AMI Customer Education Reports.

To opt out of email AMI Customer Education Reports, click the **Unsubscribe** link at the bottom of the email and follow the instructions to opt out.

> **Warning**
>
> If you click **Unsubscribe** in the email and then click to unsubscribe from *all* emails, this action is permanent, and you will not be able to opt back in. If you click to opt out of AMI Customer Education Reports only, then you can opt back into them again.

What is the difference between the "Introduction" report and "Engagement" report?

The Introduction AMI Customer Education Report is the first report in the AMI Customer Education Report program. By default, it is delivered 30 days after smart meter installation. It provides an introduction to smart meters as well as personalized hourly and daily energy use insights. The Introduction AMI Customer Education Report also encourages customers to enroll in other AMI communications offered by the utility.

The Engagement AMI Customer Education Report is the second report in the AMI Customer Education Report program. By default, it is delivered 90 days after the customer installs a smart meter. It directs the customer to utility web pages where they can view more of their energy use trends and enroll in other AMI programs and communications offered by the utility. It also includes an additional smart meter insight, which shows customers the time of day when they use the most energy.

What is in the reports?

The reports include smart meter FAQs, energy saving tips, and personalized energy use insights based on data from your smart meter. Customer Education Reports also include links to resources where you can learn more about the utility tools, programs, and communications available to customers with smart meters.

My email is not displaying correctly. Can you help?

Click the **Have trouble viewing this? Click here** link at the top of the email. A new tab opens in your web browser and your report is displayed the way it is meant to be seen.

Where can I learn more?

You can follow the URLs provided on the Customer Education Report to learn more about utility smart meter programs and enroll in other smart meter communications.

Managing AMI Customer Education Report Preferences

Because the AMI Customer Education Report program consists of only two reports and does not have a regular delivery cadence, customers cannot opt out of receiving print AMI Customer Education Reports.

To opt out of receiving email AMI Customer Education Reports, customers must also opt out of all Oracle Utilities email communications.

Viewing a Sent AMI Customer Education Report

If the customer contacts you with concerns or questions about an AMI Customer Education Report that they received, you can view the customer's AMI Customer Education Report through the CSI.

To view a sent AMI Customer Education Report:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. On the customer's account page, look in the **Customer Education Reports** area. A list of the customer's AMI Customer Education Reports is displayed. Each communication lists the type of communication, date and time it was sent, and whether it was delivered or attempted (and not successfully delivered).
4. Click the name of a report to view it.

Supporting Digital Self Service - Energy Management

The Digital Self Service - Energy Management Web Portal is a flexible web experience that provides utility customers with personalized energy data, insights, and recommendations on how to save energy. The experience is delivered through modular, mobile responsive widgets that are included in a standalone web portal or embedded in the pages of a utility's web site.

Common Support Tasks

- Answer frequently-asked questions about the Digital Self Service - Energy Management Web Portal
- Answer frequently-asked questions about the Home Energy Analysis
- Access a customer's web account
- Access a customer's widgets

See the product overview for more information about the features, requirements, and limitations of the product. See the Energy Efficiency Web Portal v3 section of the product overview for information about web portal experiences specific to customers enrolled in Home Energy Reports v3 or Email Home Energy Reports v3.

Digital Self Service - Energy Management FAQs

What is the purpose of this program?

Most customers are eager to be more energy efficient and save money, but they're not always sure how. The purpose of the Digital Self Service - Energy Management program is to provide more information about your energy use so you can make informed choices and save money. We welcome your feedback.

Why doesn't my bill comparison match up exactly with my bill?

Your bill comparison displays billing data that is sent by your utility to Oracle Utilities Opower. The data sent by your utility may not always include all the information listed in your bill, such as taxes and fees. For this reason, your bill comparison may not match your bill exactly. However, your bill comparison will still show how much you were charged for energy, as well as useful insights about the major reasons for differences between your bills (such as the impact of weather or a difference in the length of the bill period).

Can I access my account using my device of choice?

Yes. The web portal elements use a responsive design which allows them to resize automatically for a broad range of device and screen sizes.

How can I reset my password?

> **Note**
>
> If a utility implements single sign-on (SSO) authentication, all password management is handled by the utility's web portal. The information below is applicable to non-SSO customers who can manage their password from the Digital Self Service - Energy Management Web Portal. If you are unsure if your utility is using SSO or not, contact your supervisor.

If you have forgotten your password, you can use the **Forgot Password** link from the sign-in page of the web portal. You must provide the email address associated with your web account. An email is sent to this email address, which links to a form to create and confirm a new password.

If you know your current password and want to update it, select the **Account and Preferences** link to access your account options. You can then use the **Login Details** to update your password.

If you try to recover your password but do not receive a password recovery email, then it is possible you have not created an account yet. Follow the steps on the sign-in page to register and create an account if you have not already.

Home Energy Analysis FAQs

These FAQs are related to the Home Energy Analysis survey tool, which prompts customers to answer simple questions about their home and energy habits.

What is the purpose of the Home Energy Analysis?

Our research has shown that customers who want to become more energy efficient are often held back by misconceptions about how their energy use is distributed throughout their homes. With this in mind, the Home Energy Analysis survey walks you through questions about your home and then visually displays an estimated breakdown of your energy use in different categories, such as heating, cooling, or appliances. It also displays personalized tips to help you take action. This information is meant to help you focus and save.

How do you calculate my energy use for each category?

The way we calculate the energy use for each category depends on several factors, such as how much data you have and how the feature has been configured for you.

In general, the survey calculator starts with the average percentage of energy use for a specific category, such as heating or cooling. These averages are based on how energy is used in homes throughout your utility's service territory, and is pre-populated before you start answering any questions. We derive this percentage by getting census and climate zone data from the U.S. Energy Information Administration's *Residential Energy Consumption Survey*. We then use your responses to the Home Energy Analysis to adjust that baseline and make it more personalized to you.

If we have more data about your home (such as weather data, historical bills, and data from a smart meter), then the survey calculator can generate estimates for annual as well as bill-level breakdowns of your energy use. This way you may get more accurate and specific estimates for each bill period, such as an estimate of how much money you spent in each category.

How many appliances can be included in the breakdown?

The list of available appliance categories varies slightly depending on the characteristics of your home.

Scenario	Available Categories
• You only receive electricity from your utility, or you receive both electricity and gas • You have a smart meter recording interval data	• Heating • Cooling • Water Heating • Refrigeration • Oven • Dishwasher Use • Laundry • Electric Vehicle Charging • Lighting • Electronics • Pool
• You only receive electricity from your utility, or you receive both electricity and gas • You have a smart meter recording interval data	• Heating • Cooling • Water Heating • Lighting • Appliances • Electronics • Electric Vehicle • Pool • Other

Scenario	Available Categories
• Gas-only customer	• Heating • Water Heating • Pool

What time period does the survey cover?

By default, the survey estimates and displays your average *annual* energy use in different categories. This lets you see how your energy use is distributed in your home regardless of the season of year, so you can plan and take action accordingly.

Depending on how much data you have and how the feature has been configured for your utility, you may also be able to view a breakdown of your energy use by *bill period*. In this case, you can usually see an estimate of how much money you spent in each category.

How can these values be more accurate?

The best way to make your breakdown more accurate is to take the Home Energy Analysis survey. Or I can look at it for you, and we can confirm that the information we have about your home is correct. I can also check your Home Profile.

Instructions for CSRs:

Action	Steps
Check the customer's Home Energy Analysis survey.	1. Sign in to the Customer Service Interface. 2. Open the customer's web account. See Accessing a Customer's Web Portal. 3. Once you are in the customer's web account, navigate to the Home Energy Analysis survey. 4. Take the survey, confirm each answer with the customer, and correct any answer that contradicts what the customer doesn't have. For example, if the Home Energy Analysis survey indicates that the customer has a pool, but the customer says they don't have a pool, then update the survey. 5. If there is still no resolution, then file a ticket with Oracle Utilities Opower support. See Contacting Oracle Utilities Opower Support.

Action	Steps
Check customer's Home Profile.	1. Sign in to the Customer Service Interface. 2. Find and open the customer's account. 3. In the **Profile** area, click **Update Profile**. 4. Review and confirm each part of the profile with the customer, and correct any information that contradicts what the customer doesn't have. For example, if the Home Profile indicates that the customer has a pool, but the customer says they don't have a pool, then update the Home Profile. 5. If there is still no resolution, then file a ticket with Oracle Utilities Opower support. See Contacting Oracle Utilities Opower Support .

How soon will I see changes after you or I make an update?

After changes are made to your home information, you should see changes in your next report. If you're using the Home Energy Analysis survey tool on the web, then you should see some changes after you finish the survey.

If I answered questions in the previous version of the tool, do I have to answer them again in the new one?

No. Any existing answers that are applicable to the new survey will be automatically transferred as default answers. This reduces the time and effort required to complete the survey.

Supporting Distributed Energy Resources Customer Engagement

The Distributed Energy Resources product includes email communications that educate solar customers about how their solar panels impact their electric plans. These messages show them how to understand their solar bills, and how to save money.

Common Support Tasks

- Answer frequently asked questions
- View copies of sent solar communications

See the product overview for detailed information about the features, requirements, and limitations of the product.

Distributed Energy Resources FAQs

Why did I receive this email?

You are receiving this email because you are a customer who has been identified as having solar panels.

How was I selected to be part of this program?

You were selected to be part of this program because you are currently on an electricity rate plan, and you have been identified as a customer who has solar panels. These communications will help you better understand your solar bill, and help you become more efficient on your solar program.

Can I opt out of these emails?

Yes. You can opt out in a number of ways. The options available will depend on your utility's setup and program design.

From the web: The recommended method is to use the Digital Self Service - Energy Management Web Portal **Account and Preferences** section to change your preferences. If you unsubscribe in this way, you will be able to subscribe again in the future.

> **Note**
>
> Some utilities choose to host their own account services. If your utility does not offer the Digital Self Service - Energy Management Web Portal as part of their program, contact your utility for more information about account management.

From an email: Click the unsubscribe link at the bottom of the email and follow the instructions to opt out.

> **Warning**
>
> If you click **Unsubscribe** in the email and then click to unsubscribe from *all* emails, this action is permanent, and you will not be able to opt back in. If you click to opt out of Distributed Energy Resources emails only, then you can opt back into them at a later time.

Can I opt back in after I have opted out?

It depends on how you opted out. If you clicked to unsubscribe from *all* emails, then you cannot opt back in. If you clicked to opt out of Distributed Energy Resources emails only, you can opt back in at a later time.

Viewing Sent Solar Communications

To more effectively answer questions about Solar Update Notification emails, you can view copies of the communications that have been sent to a customer.

To view a sent Solar Update Notification communication:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. On the customer's account page, look in the **Solar Communications** area. A list of the customer's sent emails displays, with the most recent one at the top. Each communication lists the type of communication, date and time it was sent, and whether it was delivered or attempted (and not successfully delivered).
4. Click the name of an email to view a sent version of it.

Supporting Email Home Energy Reports

Email Home Energy Reports are communications sent through the email channel to engage utility customers about their home energy use. They include a normative comparison, personalized tips, and links to online resources where customers can learn more about their usage and ways to save. Marketing modules may also be included. The goals of the product are to give customers actionable insights about their energy and motivate them to lower their usage.

Common Support Tasks

- Answer frequently-asked questions
- Manage Email Home Energy Report preferences
- View copies of sent Email Home Energy Reports

See the product overview for more information about the features, requirements, and limitations of the product.

Email Home Energy Report FAQs

What is the purpose of the program?

Most people are eager to make their home more efficient and save money, but they're not always sure how. The purpose of program is to provide more information about your energy use so you can make informed choices and save money. We welcome your feedback.

How was I selected to be a part of this program?

You were randomly chosen to receive communications from the eligible households in our service area.

Why are you trying to make me feel bad?

We are not trying to shame or judge you. If we have offended you, it was not our intent. Rather, we hope that the information we provide can offer valuable insights and context about your home’s energy use so that you can save energy and money. We have joined other cities and utilities across the country to provide these reports because they have been proven to help households effectively save.

What are normative comparison modules?

Normative comparison modules compare a customer against themselves (for example, their past energy usage) or their neighbors. The modules are designed to motivate customers to understand the underlying causes of the differences in each comparison and subsequently reduce energy. The type of normative comparison included in a report varies by program design and report type. For more information about the neighbor comparison, see Normative Comparison FAQs.

What is the purpose of the Efficiency Zone module?

The efficiency zone compares your energy use to a target zone. It includes multiple insights to deepen your understanding of how you use energy relative to that zone, and to help you save energy and money.

What is the purpose of the Benchmark module?

The benchmark provides a dynamic, personalized, at-a-glance view of your energy use, and a preview of what you can expect to see in the rest of the report.

The benchmark takes on different states depending on how efficient your behavior is compared to similar homes within the billing period:

- **Fair**: The customer is using more than Similar Homes.
- **Good:** customer is using more than Efficiency Zone / Efficient Neighbors threshold, but less than Similar Homes.
- **Great:** The customer is using less than the Efficiency Zone / Efficient Neighbors threshold.

What is the purpose of the What Uses Most module?

Our research has shown that even customers who want to become more efficient often are held back by misconceptions as to how energy use is distributed throughout their homes. We've seen that household-level energy breakdowns are useful in helping customers figure out where to focus their energy efficiency efforts for max energy and bill savings.

The What Uses Most module highlights the top five energy uses in your home for the report period and pairs it with a related energy-savings tip to help understand how you are using energy in your home and how you can save. All estimates are based on your past energy use, weather patterns, and home characteristics.

> **Note**
>
> See Disaggregation FAQs for more information about how the What Uses Most breakdown is calculated.

Can you remove the What Uses Most module from my report?

We've seen that household-level energy breakdowns are useful in helping customers figure out where to focus their energy efficiency efforts for max energy and bill savings.

I cannot remove the module from your report; however, you can opt out of this program and stop receiving reports altogether.

> **Note**
>
> See Can I opt out of this program?

What do you do with the feedback I provide through the report?

We ask for customer feedback so that we can better understand the needs of our customers and make the reports as useful as possible.

Can I opt out of this program?

The purpose of the program is to help you. Over time participants have been shown to save energy and money, and we want to help them do the same. However, you can opt out in a number of ways. The options available will depend on your utility's setup and program design.

Would you like me to opt you out now? I can also provide you with instructions to opt yourself out at a time that is convenient for you.

Instructions for CSRs:

Action	**Steps**
Opt the customer out of the program	See Managing Email Home Energy Report Preferences.

<table>
<tr><th>Action</th><th>Steps</th></tr>
<tr><td>Provide the customer with opt out instructions</td><td>

From the web: The recommended method is to use the Digital Self Service - Energy Management Web PortalAccount and Preferences section to change your preferences. If you unsubscribe in this way, you will be able to subscribe again in the future.

Note
Some utilities choose to host their own account services. If your utility does not offer the Digital Self Service - Energy Management Web Portal as part of their program, contact your utility for more information about account management.

From an email: Click the unsubscribe link at the bottom of the email and follow the instructions to opt out.

Warning
If you click Unsubscribe in the email and then click to unsubscribe from all emails, this action is permanent, and you will not be able to opt back in. If you click to opt out of Email Home Energy Reports only, then you can opt back into them at a later time.

</td></tr>
</table>

Managing Email Home Energy Report Preferences

In the CSI, you have various options to manage communication preferences for your customers. Some options may be hidden depending on which products are provided by your utility. You may also see a message explaining that no communications for a specific type of product are available for a given customer account. Moreover, in some cases, you may be able to manage properties for products the customer is ineligible to receive.

To manage preferences:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. In the **Actions** area, select **Manage Communication Preferences**.
4. Perform one or more of the following actions:

Action	Steps
Update contact information	Click the **Edit contact info** link next to the recipient you want to update, and update the relevant contact information.
Add a new recipient	Click **Create new recipient** and enter the contact information. A customer can add up to 10 additional recipients. Each recipient must have a name and at least one communication type. **Note** When contact information is added or updated, basic validation is used to ensure that the phone number and email address resemble real values. However, these values are not automatically tested or verified, so it is possible to enter incorrect or inaccurate information, even if it looks correct.
Remove a recipient	Click **Details** next to the recipient you want to remove to display the additional contact information, then click **DELETE CONTACT**. Any recipient other than the primary recipient can be removed.
Update communication channels	In the **Home Energy Reports** area, update the **Email** preferences.

Action	Steps
Add communications to a recipient	After you have added a recipient, you can then select the communications and alerts they receive. Click **Details** next to the appropriate recipient to display the additional details. Then, select the check boxes next to each communication you want the recipient to receive. **Note** If a recipient is added for a communication that they are not eligible to receive, then the recipient will not receive it. However, the communication will remain selected in the settings. The eligibility requirements for each communication vary by utility. If you need eligibility details, ask your supervisor or contact My Oracle Support.
Opt a customer out	In the **Home Energy Reports** area, clear the **Email** checkbox. See Notes about Opting Out below for information about the rules that govern the opt-out process.

Notes about Opting Out

Be aware of the following rules that govern the opt-out process:

- If a customer is a recipient of *print* reports but not *email* reports, they can opt out of *print* reports and they can opt in to *email* reports.
- If a customer is a recipient of *email* reports but not *print* reports, they can opt out of *email* reports but cannot opt in to *print* reports.
- If a customer is a recipient of both *email* reports and *print* reports, they can opt out of both.

Viewing a Sent Email Home Energy Report

To more effectively answer questions about Email Home Energy Reports, CSRs can view copies that have been sent to a customer.

To view a sent email report:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.

3. On the customer's account page, look in the **Email Reports** area. A list of all the customer's Email Home Energy Reports displays, with the most recent report at the top. Each communication lists the type of communication, date and time it was sent, and whether it was delivered or attempted (and not successfully delivered).
4. Click the name of the appropriate email report to open an HTML version of it. You also have the option to view the raw MIME version of the email.

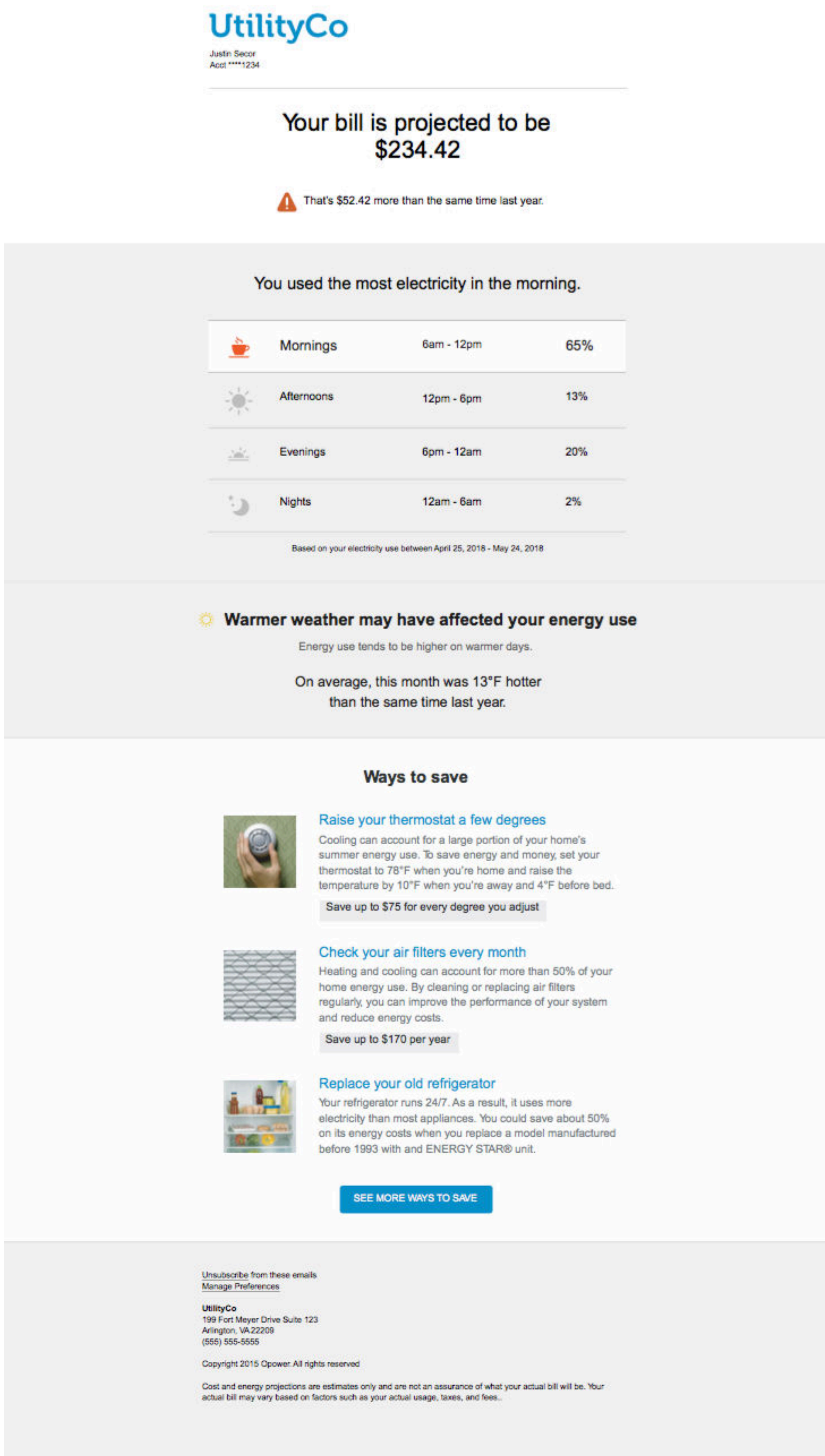
Supporting High Bill Alerts AMI

High Bill Alerts AMI are messages designed to help residential AMI customers save energy, water, and money when they are likely to use more than usual for a billing period.

Common Support Tasks

- Answer frequently-asked questions
- Manage High Bill Alerts AMI preferences
- View copies of sent High Bill Alerts AMI

See the product overview for more information about the features, requirements, and limitations of the product.


UtilityCo
Justin Secor
Acct ****1234
Your bill is projected to be
$234.42
That's $52.42 more than the same time last year.
You used the most electricity in the morning.
Mornings
6am - 12pm
65%
Afternoons
12pm - 6pm
13%
Evenings
6pm - 12am
20%
Nights
12am - 6am
2%
Based on your electricity use between April 25, 2018 - May 24, 2018
Warmer weather may have affected your energy use
Energy use tends to be higher on warmer days.
On average, this month was 13°F hotter than the same time last year.
Ways to save
Raise your thermostat a few degrees
Cooling can account for a large portion of your home's summer energy use. To save energy and money, set your thermostat to 78°F when you're home and raise the temperature by 10°F when you're away and 4°F before bed.
Save up to $75 for every degree you adjust
Check your air filters every month
Heating and cooling can account for more than 50% of your home energy use. By cleaning or replacing air filters regularly, you can improve the performance of your system and reduce energy costs.
Save up to $170 per year
Replace your old refrigerator
Your refrigerator runs 24/7. As a result, it uses more electricity than most appliances. You could save about 50% on its energy costs when you replace a model manufactured before 1993 with and ENERGY STAR® unit.
SEE MORE WAYS TO SAVE
Unsubscribe from these emails
Manage Preferences
UtilityCo
199 Fort Meyer Drive Suite 123
Arlington, VA 22209
(555) 555-5555
Copyright 2015 Opower. All rights reserved
Cost and energy projections are estimates only and are not an assurance of what your actual bill will be. Your actual bill may vary based on factors such as your actual usage, taxes, and fees..

High Bill Alert AMI FAQs

Why did you send me this alert?

We hope these alerts can provide an early warning if you are headed towards a high bill. You'll have time to reduce your energy use before you get your next bill, so there will not be any surprises when your bill arrives.

My alert says I am using more energy. How is this being calculated?

We will send you an alert when your energy use and costs are projected to be at least 30% higher than this same billing period last year. We take into account energy use and cost, so you do not get nuisance alerts just because your rate might be higher over time. If you receive an alert, it means you are using more energy.

> **Note**
>
> 30 percent is the default, but this percentage can vary by utility.

I see I need to start saving more energy. What should I do next?

Our utility offers multiple programs to help you save energy. I can help you learn more about these programs. To see energy saving tips on your own, log in to the Digital Self Service - Energy Management Web Portal and click on the **Ways to Save** tab.

Can I opt out of these alerts?

Yes. You can opt out in a number of ways. The options available will depend on your utility's setup and program design.

From the web: The recommended method is to use the Digital Self Service - Energy Management Web Portal **Account and Preferences** section to change your preferences. If you unsubscribe in this way, you will be able to subscribe again in the future.

> **Note**
>
> Some utilities choose to host their own account services. If your utility does not offer the Digital Self Service - Energy Management Web Portal as part of their program, contact your utility for more information about account management.

From an email: Click the unsubscribe link at the bottom of the email and follow the instructions to opt out.

> **Warning**
>
> If you click **Unsubscribe** in the email and then click to unsubscribe from *all* emails, this action is permanent, and you will not be able to opt back in. If you click to opt out of High Bill Alert AMI emails only, then you can opt back into them at a later time.

From a text alert: Reply STOP to the alert. This method blocks all communications through that specific channel. If you reply with STOP, you will never receive an SMS again.

From a voice alert: Press the appropriate number on your phone as described in the message. This method permanently unsubscribes you from the voice alerts, and you will be unable to subscribe at a later time.

Can I opt back in after I have opted out?

It depends on how you originally opted out.

- If you changed your alert preferences through the Digital Self Service - Energy Management Web Portal, you can opt back in again. Log in to the web portal, go to **Account and Preferences**, and select how you want to receive alerts.
- If you clicked **Unsubscribe** at the bottom of an email and opted out of *all* emails, you cannot opt back in again. However, if you opted out of High Bill Alert AMI emails only, you can opt back in again.
- If you texted STOP to unsubscribe from a text alert, or dialed a number to unsubscribe from a voice alert, you cannot subscribe again. However, you can go to the Digital Self Service - Energy Management Web Portal and add an additional, different email address to receive alerts again through the email channel.

  Moreover, you can always check your energy use in the Digital Self Service - Energy Management Web Portal. The **Home** page has a module that will notify you how much energy you are projected to use and how this usage compares to the same billing period last year.

What other ways can I find out if I'm heading towards a high bill?

You can receive High Bill Alerts AMI by email, text message, and voice message. I can help you sign up for these types of alerts. You can also check your energy usage in the Digital Self Service - Energy Management Web Portal. The **Home** page has a module that will tell you how much energy you are projected to use and how this usage compares to the same billing period last year.

My bill was not as high as my alert projected. Why?

Forecasts are estimated projections. Although we try to make them as accurate as possible, we cannot account for every single variable that can affect the final cost of your bill. For example, due to a variable like drastic weather change you may receive a higher projection than your actual bill.

My bill was higher than projected even though I reduced my usage. Why?

Forecasts are estimated projections. Although we try to make them as accurate as possible, they do not include costs like taxes, fees, and any additional changes.

I know someone else in this utility who can receive alerts, but I don't have the option. Why?

Thank you for your interest in the program. There are a number of reasons that some customers are not included in the program. For example, at this time, alerts are not available to non-residential customers, and customers with a limited history of energy use at a specific address. We may expand the program to include other customers in the future.

If I sign up to receive alerts, how many will I receive?

You should not worry about receiving too many alerts. You will not receive more than one alert of each type (email, text, or voice) during a billing period.

Managing High Bill Alert AMI Preferences

In the CSI, you have various options to manage communication preferences for your customers. Some options may be hidden depending on which products are provided by your utility. You may also see a message explaining that no communications for a specific type of product are available for a given customer account. Moreover, in some cases, you may be able to manage properties for products the customer is ineligible to receive.

To manage preferences:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. In the **Actions** area, select **Manage Communication Preferences**.
4. Perform one or more of the following actions:

Action	Steps
Update contact information	Click the **Edit contact info** link next to the recipient you want to update, and update the relevant contact information.
Add a new recipient	Click **Create new recipient** and enter the contact information. A customer can add up to 10 additional recipients. Each recipient must have a name and at least one communication type. **Note** When contact information is added or updated, basic validation is used to ensure that the phone number and email address resemble real values. However, these values are not automatically tested or verified, so it is possible to enter incorrect or inaccurate information, even if it looks correct.

Action	Steps
Remove a recipient	Click **Details** next to the recipient you want to remove to display the additional contact information, then click **DELETE CONTACT**. Any recipient other than the primary recipient can be removed.
Update communication channels	In the **High bill alerts** area, update the **Mail** (printed) and **Email** preferences. The **High bill alerts** area is hidden from customers that do not have AMI data. A customer has the option to unsubscribe from voice alerts from the phone when they receive an alert.
Add communications to a recipient	After you have added a recipient, you can then select the communications and alerts they receive. Click **Details** next to the appropriate recipient to display the additional details. Then, select the check boxes next to each communication you want the recipient to receive. **Note** If a recipient is added for a communication that they are not eligible to receive, then the recipient will not receive it. However, the communication will remain selected in the settings. The eligibility requirements for each communication vary by utility. If you need eligibility details, ask your supervisor or contact My Oracle Support.
Opt out a customer	In the **High bill alerts** area, clear the **Mail** (printed) and **Email** checkboxes. A customer has the option to unsubscribe from voice alerts from the phone when they receive an alert.

Viewing a Sent High Bill Alert AMI Communication

To more effectively answer questions about alerts, you can view copies that have been sent to a customer.

To view a sent alert:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.

3. On the customer's account page, look in the **Customer Alerts** area. A list of the customer's alerts displays, with the most recent one at the top. Each communication lists the type of communication, date and time it was sent, and whether it was delivered or attempted (and not successfully delivered).
4. Click the name of an alert to view a sent version of it.

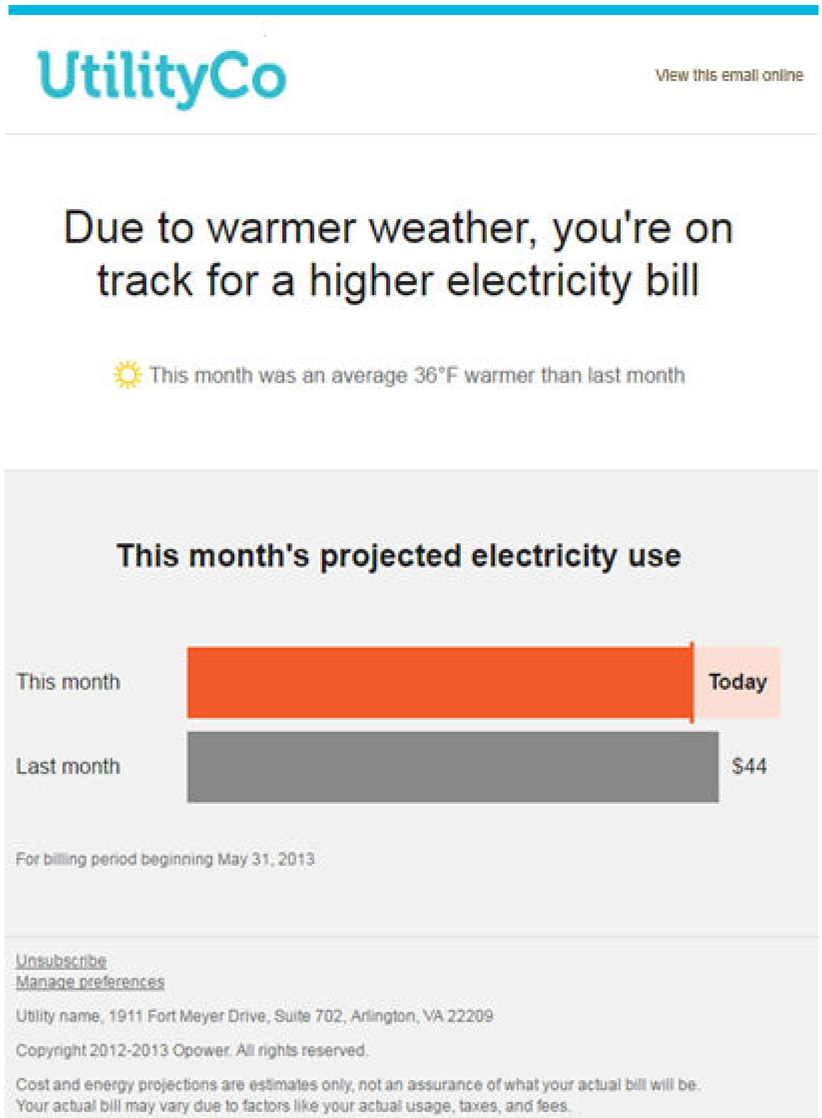
Supporting High Bill Alerts (non-AMI)

High Bill Alerts (non-AMI) are digital communications sent to the customer's email account to inform customers when they are expected to receive a higher energy bill. This forecast is based on fluctuations in weather compared to a previous billing period and a home's sensitivity to these fluctuations.

Common Support Tasks

- Answer frequently-asked questions
- Manage High Bill Alerts (non-AMI) preferences
- View copies of sent High Bill Alerts (non-AMI)

See the product overview for more information about the features and requirements of the product.



High Bill Alerts (non-AMI) FAQs

What are High Bill Alerts (non-AMI)?

High Bill Alerts (non-AMI) are email messages that we send you when we estimate that you may spend more money on your energy bill this bill period compared to the last billing period. Generally, people fluctuate in their energy use due to changes in the weather. We measure how sensitive your home is to changes in the weather and sends you an alert if the weather during this billing period might cause your home to use more energy. We hope that these alerts can provide an early warning if you are headed towards a high bill. You should have time to reduce your usage before you get your next bill, so there will not be any surprises when your bill arrives.

My alert says I am using more energy. How is this being calculated?

We will send you an alert when your energy usage and costs are projected to be at least 30% higher than your previous bill. We take into account usage and cost, so you do not get nuisance alerts just because your rate might be higher over time. If you receive an alert, it means you are using more energy.

> **Note**
>
> A value of 30% is the default percentage. This percentage may vary by utility. Contact your supervisor if you have any questions.

Why are you comparing this month to a previous bill period?

We want you to be able to see how much energy you use from billing cycle to billing cycle as the weather changes. We track the local weather patterns in your area to make sure that our estimates are accurate and reflect the weather that you experience each billing period.

I'd like to start saving more energy. What can I do?

Our utility offers multiple programs to help you save energy. I can help you learn more about these programs. To see energy saving tips on your own, log in to the Oracle Utilities web portal and click on the **Ways to Save** tab.

Can I opt out of this program?

Yes. You can opt out in a number of ways. The options available will depend on your utility's setup and program design.

From the web: The recommended method is to use the Digital Self Service - Energy Management Web Portal **Account and Preferences** section to change your preferences. If you unsubscribe in this way, you will be able to subscribe again in the future.

> **Note**
>
> Some utilities choose to host their own account services. If your utility does not offer the Digital Self Service - Energy Management Web Portal as part of their program, contact your utility for more information about account management.

From an email: Click the unsubscribe link at the bottom of the email and follow the instructions to opt out.

> **Warning**
>
> f you click **Unsubscribe** in the email and then click to unsubscribe from *all* emails, this action is permanent, and you will not be able to opt back in. If you click to opt out of High Bill Alert (non-AMI) emails only, then you can opt back into them at a later time.

Can I opt back in after I have opted out?

It depends on how you originally opted out.

- If you changed your alert preferences through the Digital Self Service - Energy Management Web Portal, you can opt back in again. Log in to the web portal, go to **Account and Preferences**, and select how you want to receive alerts.

- If you clicked the unsubscribe link on the bottom of an email alert and opted out of *all* emails, you cannot opt back in again. However, if you opted out of High Bill Alert AMI emails only, you can opt back in again.

Why did I receive two alerts in the same billing period?

We send separate alerts for gas and electric usage. If you are expected to have a high bill for both these fuel types, you will receive two alerts in the same billing period.

Managing High Bill Alerts (non-AMI) Preferences

In the CSI, you have various options to manage communication preferences for your customers. Some options may be hidden depending on which products are provided by your utility. You may also see a message explaining that no communications for a specific type of product are available for a given customer account. Moreover, in some cases, you may be able to manage properties for products the customer is ineligible to receive.

You can also instruct customers to click **Unsubscribe** at the header or footer of the email and follow the instruction to log out. They may also be able to modify their account setting from their utility account.

To manage preferences:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. In the **Actions** area, select **Manage Communication Preferences**.
4. Perform one or more of the following actions:

Action	Steps
Update contact information	Click the **Edit contact info** link next to the recipient you want to update, and update the relevant contact information.

Action	Steps
Add a new recipient	Click **Create new recipient** and enter the contact information. A customer can add up to 10 additional recipients. Each recipient must have a name and at least one communication type. **Note** When contact information is added or updated, basic validation is used to ensure that the phone number and email address resemble real values. However, these values are not automatically tested or verified, so it is possible to enter incorrect or inaccurate information, even if it looks correct.
Remove a recipient	Click **Details** next to the recipient you want to remove to display the additional contact information, then click **DELETE CONTACT**. Any recipient other than the primary recipient can be removed.
Update communication channels	In the **High Bill Alert** area, update the **Email** preferences. The **High Bill Alert** area is hidden from customers that are not eligible for those communications.

Action	Steps
Add communications to a recipient	After you have added a recipient, you can then select the communications and alerts they receive. Click **Details** next to the appropriate recipient to display the additional details. Then, select the check boxes next to each communication you want the recipient to receive. **Note** If a recipient is added for a communication that they are not eligible to receive, then the recipient will not receive it. However, the communication will remain selected in the settings. The eligibility requirements for each communication vary by utility. If you need eligibility details, ask your supervisor or contact My Oracle Support.
Opt out a customer	In the **High Bill Alert** area, clear the **Email**, **Voice** or **SMS** check box.

Viewing a Sent High Bill Alert (non-AMI) Communication

To more effectively answer questions about alerts, you can view copies that have been sent to a customer.

To view a sent alert:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. On the customer's account page, look in the **Customer Usage Notifications** area. A list of the customer's alerts is displayed, with the most recent alert at the top. Each communication lists the type of communication, date and time it was sent, and whether it was delivered or attempted (and not successfully delivered).
4. Click the name of an alert to view a sent version of it.

Supporting Home Energy Reports

Home Energy Reports are user-friendly print communications that provide personalized information to customers about their energy use. They typically include a normative comparison, personalized tips, and details about online resources where customers can learn more about their usage and ways to save. The goals of the product are to give customers actionable insights about their energy and motivate them to lower their usage.

Common Support Tasks

- Answer frequently-asked questions
- Manage Home Energy Report preferences
- View copies of sent Home Energy Reports

See the product overview applicable to your situation for more information about the features, requirements, and limitations of the product.

Home Energy Reports FAQs

Why don't I receive reports?

There are several possible explanations for why you haven't received a report.

- **You may not have been selected as a program participant**: We randomly selected participants for this program, and so not everyone will receive a report. We are currently testing the effectiveness of this program and may expand it in the future.
- **You may not have lived at your current premise long enough**: The program can only be provided to households where we know how much energy has been used in the past.
- **Your house may appear to be vacant**: If you have been away from home for a very long time or use a very small amount of energy, we may think your house is empty.
- **You may generate some of your own power**: For homes that generate a significant percentage of the power that they use, we can only determine your net energy usage. Therefore, your home does not provide a good comparison for homes that do not have local generation capability.
- **You may be on a medical rate assistance program (sometimes applicable to customers in the U.S.)**: We do not provide reports to customers who are on rate assistance programs for medical or financial reasons. (Depending on the country or region you live in, this may or may not be applicable you.)
- **You may just be ineligible this month**: Due to the timing of meter reads or some other factor, it is possible that you didn't receive a report this month but that you will soon. I can check for you in our database to see whether or not you have been selected as a program participant.
- **You may no longer be part of the reports program**. Thank you for your interest in the program. We hope it's been able to provide you with information about your energy use so you can make more informed choices and save money. Although this particular program is ending for some customers at this time, the feedback and experiences you share will us help determine what types of efficiency programs to offer in the future. You will no longer receive paper reports in the mail, but there are other ways you can continue to learn about your energy use.

> **Note**
>
> This is an opportunity to highlight other energy saving programs offered by your utility. For example, if your utility is participating in other Oracle Utilities Opower programs, the customer may be able log in to the Oracle Utilities Opower web portal to see a neighbor comparison, tips, and other information similar to the paper reports. Your utility may also offer the option to receive Email Home Energy Reports and alerts. Outside of Oracle Utilities Opower offerings, your utility may offer rebates, online materials, and other efficiency programs to help customers save. Talk to your supervisor about the best way to promote these resources to customers.

Is my report available by email?

Let's check if your report is available by email or not. Sign in to your account on the Oracle Utilities Opower web portal and go to the **Account and Settings** area. Depending on your utility's setup and configuration, you may be able to choose to receive both email and paper reports, or receive just email reports.

What is the purpose of the Efficiency Zone module?

The efficiency zone compares your energy use to a target zone. It includes multiple insights to deepen your understanding of how you use energy relative to that zone, and to help you save energy and money.

What is the purpose of the Benchmark module?

The benchmark provides a dynamic, personalized, at-a-glance view of your energy use, and a preview of what you can expect to see in the rest of the report.

The benchmark takes on different states depending on how efficient your behavior is compared to similar homes within the billing period:

- **Fair**: The customer is using more than Similar Homes.
- **Good:** customer is using more than Efficiency Zone / Efficient Neighbors threshold, but less than Similar Homes.
- **Great:** The customer is using less than the Efficiency Zone / Efficient Neighbors threshold.

What is the purpose of the What Uses Most module?

Our research has shown that even customers who want to become more efficient often are held back by misconceptions as to how energy use is distributed throughout their homes. We've seen that household-level energy breakdowns are useful in helping customers figure out where to focus their energy efficiency efforts for max energy and bill savings.

The What Uses Most module highlights the top five energy uses in your home for the report period and pairs it with a related energy-savings tip to help understand how you are using energy in your home and how you can save. All estimates are based on your past energy use, weather patterns, and home characteristics.

> **Note**
>
> See Disaggregation FAQs for more information about how the What Uses Most breakdown is calculated.

Can you remove the What Uses Most module from my report?

We've seen that household-level energy breakdowns are useful in helping customers figure out where to focus their energy efficiency efforts for max energy and bill savings.

I cannot remove the module from your report; however, you can opt out of this program and stop receiving reports altogether.

> **Note**
>
> See Can I opt out of this program?

If the goal of this program is to save resources, why are you wasting paper?

Our research shows that paper reports are extremely effective in helping people save energy and lower their bills. However, we may offer the option to receive your report by email instead of mail. I can check now if you're interested, and if this option is available, I can sign you up.

> **Note**
>
> This option is only available if your utility supports Email Home Energy Reports and the customer is eligible to receive them. See Managing Home Energy Report Preferences for details.

Can I switch to paperless reports?

The paperless option is only available if your utility provides an Email Home Energy Report program. Would you like me to see if you are eligible for paperless reports?

Instructions for CSRs:

- See for Managing Home Energy Report Preferences for switching the customer to paperless reports instructions

Can I opt out of this program?

The purpose of the program is to help you. Over time participants have been shown to save energy and money, and we want to help them do the same. However, you can opt out in a number of ways. The options available will depend on your utility's setup and program design.

Would you like me to opt you out now? I can also provide you with instructions to opt yourself out at a time that is convenient for you.

Instructions for CSRs:

Action	Steps
Opt the customer out of the program	See Managing Home Energy Report Preferences.
Provide the customer with self-service opt out instructions	**From the web**: The recommended method is to use the Digital Self Service - Energy Management Web Portal **Account and Preferences** section to change your preferences. If you unsubscribe in this way, you will be able to subscribe again in the future. **Note** Some utilities choose to host their own account services. If your utility does not offer the Digital Self Service - Energy Management Web Portal as part of their program, contact your utility for more information about account management.

Why did I receive a report after I was opted out?

Due to the time required to create a Home Energy Report and mail it to you, another report may have already been in process when you requested to opt out. This means you might receive one additional report after opting out, depending on the timing of your request. Rest assured that you will not receive any more reports after that.

Managing Home Energy Report Preferences

In the CSI, you have various options to manage communication preferences for your customers. Some options may be hidden depending on which products are provided by your utility. You may also see a message explaining that no communications for a specific type of product are available for a given customer account. Moreover, in some cases, you may be able to manage properties for products the customer is ineligible to receive.

To manage preferences:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. In the **Actions** area, select **Manage Communication Preferences**.
4. Perform one or more of the following actions:

Action	Steps
Update contact information	Click the **Edit contact info** link next to the recipient you want to update, and update the relevant contact information.
Add a new recipient	Click **Create new recipient** and enter the contact information. A customer can add up to 10 additional recipients. Each recipient must have a name and at least one communication type. **Note** When contact information is added or updated, basic validation is used to ensure that the phone number and email address resemble real values. However, these values are not automatically tested or verified, so it is possible to enter incorrect or inaccurate information, even if it looks correct.
Remove a recipient	Click **Details** next to the recipient you want to remove to display the additional contact information, then click **DELETE CONTACT**. Any recipient other than the primary recipient can be removed.
Update communication channels	In the **Home Energy Reports** area, update the **Mail** (printed) checkbox. The **Mail** option will only display if the customer is already a recipient of print Home Energy Reports. To go paperless, update the **Email** checkbox.
Go paperless	In the **Home Energy Reports** area, update the **Email** checkbox. This option will only display if the utility provides email reports and the customer is eligible to receive them.
Add a recipient to a channel	Home Energy Reports are only sent to the primary mailing address for the utility account. You cannot add print reports to additional recipients.
Opt a customer out	In the **Home Energy Reports** area, clear the **Mail** checkbox. See Notes about Opting Out below for information about the rules that govern the opt-out process.

Notes about Opting Out

Be aware of the following rules that govern the opt-out process for Home Energy Reports:

- If a customer is a recipient of *print* reports but not *email* reports, they can opt out of *print* reports and they can opt in to *email* reports.
- If a customer is a recipient of *email* reports but not *print* reports, they can opt out of *email* reports but cannot opt in to *print* reports.
- If a customer is a recipient of both *email* reports and *print* reports, they can opt out of both.
- Due to the time required to create a Home Energy Report, print it, and mail it, another report may have already been in process when the customer requested to opt out. This means a customer might receive one additional report after opting out, depending on the timing of the request.

Viewing a Sent Home Energy Report

To more effectively answer questions about Home Energy Reports, CSRs can view copies that have been sent to a customer.

To view a sent Home Energy Report:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. On the customer's account page, look in the **Print Reports** area. A list of all the customer's print reports displays, with the most recent report listed at the top. Each communication lists the type of communication, date and time it was sent, and whether it was delivered or attempted (and not successfully delivered).
4. Click on the link of the desired report. A version of the report will open in a new window.

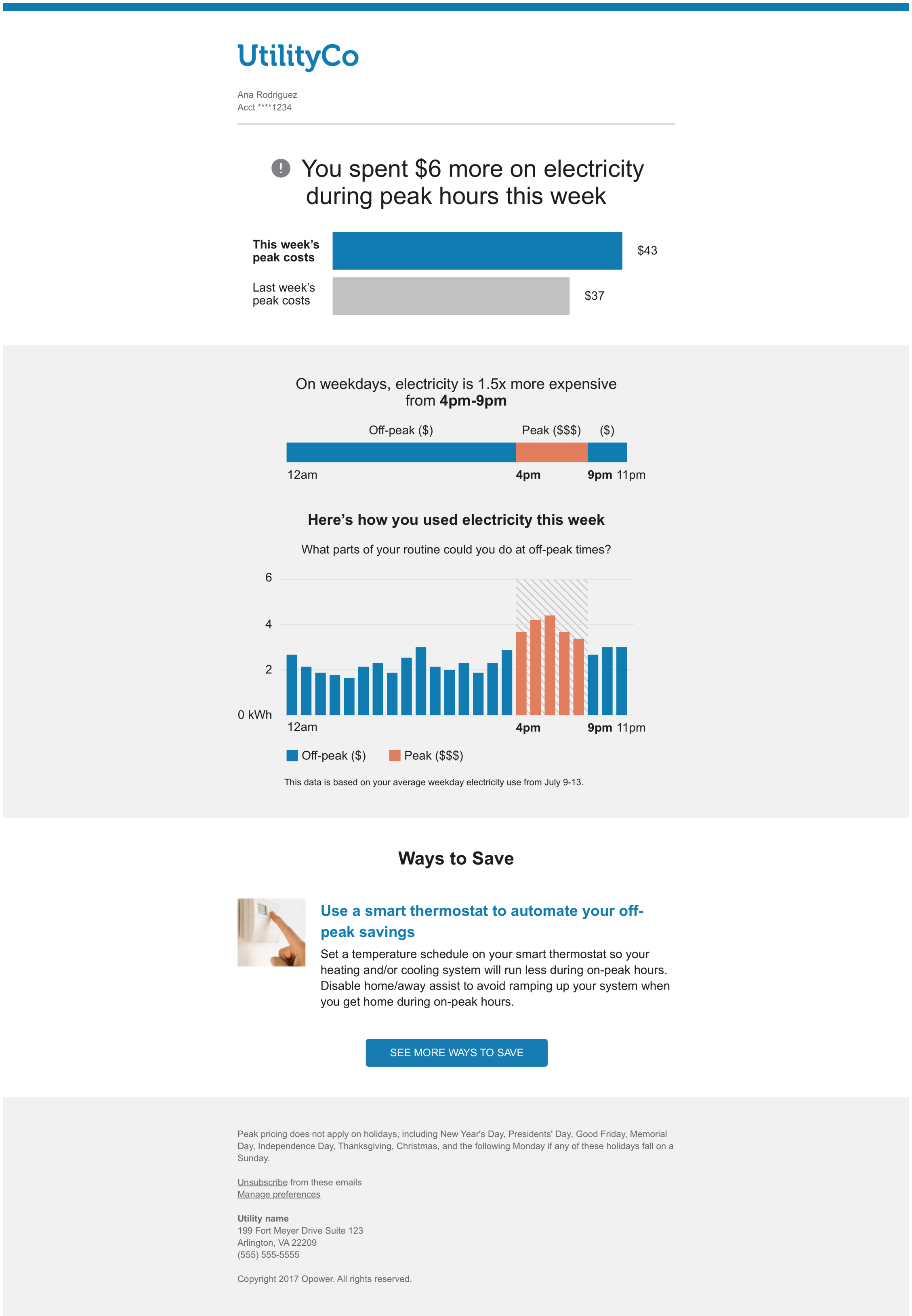
Supporting Load Shifting: Rate Coach

The Load Shifting: Rate Coach product includes print and email communications that educate customers about their Time of Use rate plans and shows them how to save money by shifting their energy use to off-peak demand periods.

Common Support Tasks

- Answer frequently-asked questions
- Manage Load Shifting Preferences
- View copies of sent Rate Coach communications

See the product overview for detailed information about the features, requirements, and limitations of the product.


UtilityCo
Ana Rodriguez
Acct ****1234
You spent $6 more on electricity during peak hours this week
This week's peak costs
$43
Last week's peak costs
$37
On weekdays, electricity is 1.5x more expensive from 4pm-9pm
Off-peak ($)
Peak ($$$)
($)
12am
4pm
9pm
11pm
Here's how you used electricity this week
What parts of your routine could you do at off-peak times?
6
4
2
0 kWh
12am
4pm
9pm
11pm
Off-peak ($)
Peak ($$$)
This data is based on your average weekday electricity use from July 9-13.
Ways to Save
Use a smart thermostat to automate your off-peak savings
Set a temperature schedule on your smart thermostat so your heating and/or cooling system will run less during on-peak hours. Disable home/away assist to avoid ramping up your system when you get home during on-peak hours.
SEE MORE WAYS TO SAVE
Peak pricing does not apply on holidays, including New Year's Day, Presidents' Day, Good Friday, Memorial Day, Independence Day, Thanksgiving, Christmas, and the following Monday if any of these holidays fall on a Sunday.
Unsubscribe from these emails
Manage preferences
Utility name
199 Fort Meyer Drive Suite 123
Arlington, VA 22209
(555) 555-5555
Copyright 2017 Opower. All rights reserved.

Load Shifting FAQs

Why did I receive this email?

You are receiving this email because you are enrolled in a Time of Use rate plan. In a Time of Use plan, the cost of electricity depends on the time of day and how the utility defines on-peak versus off-peak hours. We want to help you save money on your electricity bill by shifting your peak energy use to off-peak hours.

How was I selected to be part of this program?

You were selected to be part of this program because you are currently on a Time of Use electricity rate plan. These communications will help you save energy and money during times of day when energy is more expensive.

How can the report be accurate if I am gone for extended periods of time?

The Load Shifting report is based on data pulled directly from your smart meter that is monitoring the energy usage in your home. Even if you are not actually in your home, there are probably still devices drawing power. For example, your air conditioning and large appliances like refrigerators may still be drawing power even though they cycle on and off. You may also have other devices that are drawing power because they are always plugged in, such as game consoles and security systems. Taken together, these appliances and devices can use a significant amount of energy while you're away.

I have been gone all month, yet the report says I am using more energy. Why?

There are several possible reasons for why you may have used more energy even though you have been away from your home for a while.

- You may have many devices or appliances that are drawing power simply because they are plugged in (such as game consoles, security systems, and refrigerators).
- The weather may have fluctuated considerably. For example, if the weather was very hot while you were away and you kept your thermostat at a static set point, then your air conditioning could have used a lot more energy than usual to keep your home cool during extreme weather.
- Your electricity rate plan may have changed recently. Time of Use rates often change prices, or the cost of energy during peak hours, or both. If you were not aware of these changes, they could have also led to higher energy costs during peak hours.

I haven't changed anything, yet the report says I am using more energy. Why?

See the FAQ above about why some customers may use more energy even if they are not home. In short, some reasons may be that (1) you have a large number of devices that are always plugged in, (2) the weather may have fluctuated considerably, or (3) your rate plan may have changed its costs or its on-peak and off-peak hours.

Can I opt out of these emails?

Yes. You can opt out in several ways. The options available will depend on your utility's setup and program design.

From the web: The recommended method is to use the Digital Self Service - Energy Management Web Portal **Account and Preferences** section to change your preferences. If you unsubscribe in this way, you will be able to subscribe again in the future.

> **Note**
>
> Some utilities choose to host their own account services. If your utility does not offer the Digital Self Service - Energy Management Web Portal as part of their program, contact your utility for more information about account management.

From an email: Click the unsubscribe link at the bottom of the email and follow the instructions to opt out.

> **Warning**
>
> If you click **Unsubscribe** in the email and then click to unsubscribe from *all* emails, this action is permanent, and you will not be able to opt back in. If you click to opt out of Load Shifting emails only, then you can opt back into them at a later time.

Can I opt back in after I have opted out?

It depends on how you opted out. If you clicked to unsubscribe from *all* emails, then you cannot opt back in. If you clicked to opt out of Load Shifting emails only, you can opt back into them at a later time.

Managing Load Shifting: Rate Coach Preferences

In the CSI, you have various options to manage communication preferences for your customers. Some options may be hidden depending on which products are provided by your utility. You may also see a message explaining that no communications for a specific type of product are available for a given customer account. Moreover, in some cases, you may be able to manage properties for products the customer is ineligible to receive.

To manage preferences:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. In the **Actions** area, select **Manage Communication Preferences**.
4. Perform one or more of the following actions:

Action	Steps
Update contact information	Click the **Edit contact info** link next to the recipient you want to update, and update the relevant contact information.

Action	Steps
Add a new recipient	Click **Create new recipient** and enter the contact information. A customer can add up to 10 additional recipients. Each recipient must have a name and at least one communication type. **Note** When contact information is added or updated, basic validation is used to ensure that the phone number and email address resemble real values. However, these values are not automatically tested or verified, so it is possible to enter incorrect or inaccurate information, even if it looks correct.
Remove a recipient	Click **Details** next to the recipient you want to remove to display the additional contact information, then click **DELETE CONTACT**. Any recipient other than the primary recipient can be removed.
Update communication channels	In the **Rate Coach** area, update the **Email** preferences. The **Rate Coach** area is hidden from customers that are not eligible for Rate Coach communications.

Action	Steps
Add communications to a recipient	After you have added a recipient, you can then select the communications and alerts they receive. Click **Details** next to the appropriate recipient to display the additional details. Then, select the check boxes next to each communication you want the recipient to receive. **Note** f a recipient is added for a communication that they are not eligible to receive, then the recipient will not receive it. However, the communication will remain selected in the settings. The eligibility requirements for each communication vary by utility. If you need eligibility details, ask your supervisor or contact My Oracle Support.
Opt out a customer	In the **Rate Coach** area, clear the **Email** check box.

Viewing a Sent Load Shifting: Rate Coach Communication

To more effectively answer questions about Load Shifting emails, you can view copies of the communications that have been sent to a customer.

To view a sent Rate Coach communication:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. On the customer's account page, look in the **Rate Coach Communications** area. A list of the customer's sent emails displays, with the most recent one at the top. Each communication lists the type of communication, date and time it was sent, and whether it was delivered or attempted (and not successfully delivered).
4. Click the name of an email to view a sent version of it.

Supporting Peak Day Communications

Peak day communications are messages sent through the email, text, and voice channels to help customers lower their energy use during periods when energy costs the most money.

They include the Oracle Utilities Opower Peak Time Rebates and Behavioral Demand Response communications.

Common Support Tasks

- Answer frequently-asked questions about Behavioral Demand Response
- Answer frequently-asked questions about Peak Time Rebates
- Manage peak day communication preferences
- View copies of sent peak day communications

See the Peak Time Rebates product overview or Behavioral Demand Response product overview for more information about each product's features and requirements.

Behavioral Demand Response FAQs

What is the purpose of the Behavioral Demand Response program?

The purpose of the program is to encourage people to reduce energy during peak event days, which happen when energy use is higher than usual. This is done by sending communications that help you and other utility customers to lower energy demand on a large scale. This not only saves energy and money, but also allows utilities to keep from powering up extra energy resources (such as additional power plants) to meet demand.

What are peak events?

Peak events are days in which the demand for energy exceeds a utility's capacity to supply it. These days often occur during extreme cold or hot weather conditions, when the demand for energy is high. As a result, electricity becomes very expensive to produce. For the hours of the peak event in which energy is the most expensive, we ask you to reduce your energy use so you can save money and help lower the demand for energy in your area.

How was I selected to be part of this program?

Different utilities have different goals, and so they may select program participants in different ways. Some utilities select all eligible customers in a service area. Other utilities select a random subset of eligible customers. Either way, the goal is to help you understand your energy use and lower your bill.

> **Note**
>
> Your utility may want you to emphasize a specific method for how customers were selected. Check with your supervisor for more information.

What are some ways I can save energy during a peak event?

The tips you can follow vary depending on whether the peak event takes place during the summer or winter. Here are a few of the most effective ways you can save electricity during a peak event in the summer.

- **Raise your thermostat by 3-4 degrees**. Decreasing your use of air conditioning during peak hours is the most effective way to save energy.

- **Use fans and reduce air conditioning.** Fans can help you beat the heat while reducing your AC needs. Every degree counts. Raise your thermostat's setting by 3-4 degrees during peak hours and stay close to fans to help keep cool.
- **Enjoy unplugged activities**. Put off running the dishwasher or doing the laundry until nighttime. Instead of watching TV or using electronics that need to be plugged in, read a book, play a board game, or spend quality time with your household members.

Can I opt out of this program?

Yes. You can opt out in a number of ways. The options available will depend on your utility's setup and program design.

From the web: The recommended method is to use the Digital Self Service - Energy Management Web Portal **Account and Preferences** section to change your preferences. If you unsubscribe in this way, you will be able to subscribe again in the future.

> **Note**
>
> Some utilities choose to host their own account services. If your utility does not offer the Digital Self Service - Energy Management Web Portal as part of their program, contact your utility for more information about account management.

From an email: Click the unsubscribe link at the bottom of the email and follow the instructions to opt out.

> **Warning**
>
> If you click **Unsubscribe** in the email and then click to unsubscribe from *all* emails, this action is permanent, and you will not be able to opt back in. If you click to opt out of Behavioral Demand Response emails only, then you can opt back into them at a later time.

What is a multi-day peak event?

A multi-day peak event is when multiple peak days are scheduled over consecutive days. When this happens, pre-event messages include information about the consecutive days peak days. For example, pre-event emails and phone calls will specify the date range for the multi-day peak event.

Post-event results are communicated as soon as your energy savings from the event has been calculated, but you will not receive more than one phone call per day. If you are receiving email communications, you will receive an email as soon as your results are available and may receive more than one email per day.

Post-event results are communicated as soon as your energy savings from the event has been calculated.

Why did I only receive results for some of the peak days but not others?

Your results are sent to you as soon as they are ready. Calculations might not be complete yet for all of your peak day efforts.

Why did I receive so many messages for a single peak event?

You should only receive one pre-event and one post-event message for each peak event day. If there is a multi-day peak event, we do our best to bundle the previous day's results with the next day's notification so you only receive a single message that contains both pre-event and post news. However, you may receive more than one email from us, depending on when your results are calculated. If you are receiving email messages, you might receive an email for each day of results. You will never receive more than one voice message per day from us.

How often will I experience a peak event?

Peak events are dictated primarily by the weather. We will try to schedule as few peak events as possible. However, if the weather is severe enough that energy resources might become affected, we will set up a peak event. Your efforts to reduce energy use during a peak event are greatly appreciated and help keep electricity rates down for all customers.

Why didn't I receive a communication after the event ended?

You should receive a communication within a few days after the peak event. Sometimes it takes several days to receive your home’s data and provide a valid comparison.

Why should I participate in a peak event?

Primarily, we want to you participate in peak events to help reduce energy use so that we can be assured that everyone in your area will be able to access the energy they need. This includes businesses, schools, and hospitals as well as residences like yours. Participating in a peak event will also save you money as reducing your energy use during a peak event can significantly affect your bill. Our energy use recommendations for a peak event are carefully calculated to minimize any discomfort you may experience while still greatly reducing the energy needs in your area.

Why are you comparing me to my neighbors?

We are joining other utilities and cities across the country to provide this information because it has been proven to effectively help customers save energy and money. We compare your energy use to the use of similar size homes that are close to yours and have similar characteristics. We do this to provide you with education and context, and to offer an idea of what you could realistically save during the peak event.

How do you select my neighbors?

Our goal is to provide you with a comparison that is valid and meaningful. We do this by looking at other occupied households in your area with similar characteristics, such as home size and home type, since they have similar energy needs. Most importantly, we only include homes that appear to be occupied at the time of the comparison.

Why are you trying to make me feel bad?

We are not trying to shame or judge you. If we have offended you, it was not our intent. Rather, we hope that the information we provide can offer valuable insights and context about your home’s energy use during peak events so that you can save energy and money. We have joined other utilities across the country to provide these notifications because they have been proven to help households effectively save energy during peak event hours.

How do you know the comparison is valid?

Our comparisons include approximately 100 similar, nearby, occupied homes. Our research shows that for almost all residents, this 100-home average indicates typical usage.

Peak Time Rebates FAQs

Why am I receiving these notifications?

You are receiving these notifications because you are enrolled in the Peak Time Rebates program to help you earn credits towards your next bill by reducing your energy usage on particular days.

What are some ways I can save energy during a peak event?

The tips you can follow vary depending on whether the peak event takes place during the summer or winter. Here are a few of the most effective ways you can save electricity during a peak event in the summer.

- **Raise your thermostat by 3-4 degrees**. Decreasing your use of air conditioning during peak hours is the most effective way to save energy.
- **Use fans and reduce air conditioning**. Fans can help you beat the heat while reducing your AC needs. Every degree counts. Raise your thermostat's setting by 3-4 degrees during peak hours and stay close to fans to help keep cool.
- **Enjoy unplugged activities**. Put off running the dishwasher or doing the laundry until nighttime. Instead of watching TV or using electronics that need to be plugged in, read a book, play a board game, or spend quality time with your household members.

Can I receive different communications through different channels?

Yes. Pre-event and post-event communication preferences are independent of one another. It is possible, for example, to receive pre-event communications via text and post-event communications by email.

Why didn't I receive a communication after the event ended?

There are several reasons that you may not have received a communication after the event ended. You may not have configured your preferences for how you want your communication delivered to you, or your contact information may be incorrect.

Can I opt out of this program?

Yes. You can opt out in a number of ways. The options available will depend on your utility's setup and program design.

From the web: The recommended method is to use the Digital Self Service - Energy Management Web Portal **Account and Preferences** section to change your preferences. If you unsubscribe in this way, you will be able to subscribe again in the future.

> **Note**
>
> Some utilities choose to host their own account services. If your utility does not offer the Digital Self Service - Energy Management Web Portal as part of their program, contact your utility for more information about account management.

From an email: Click the unsubscribe link at the bottom of the email and follow the instructions to opt out.

> **Warning**
>
> If you click **Unsubscribe** in the email and then click to unsubscribe from *all* emails, this action is permanent, and you will not be able to opt back in. If you click to opt out of Peak Time Rebate emails only, then you can opt back into them at a later time.

From a text alert: Reply STOP to the alert. This method blocks all communications through that specific channel. If you reply with STOP, you will never receive an SMS again.

From a voice alert: Press the appropriate number on your phone as described in the message. This method permanently unsubscribes you from the voice alerts, and you will be unable to subscribe at a later time.

Managing Peak Day Communication Preferences

In the CSI, you have various options to manage communication preferences for your customers. Some options may be hidden depending on which products are provided by your utility. You may also see a message explaining that no communications for a specific type of product are available for a given customer account. Moreover, in some cases, you may be able to manage properties for products the customer is ineligible to receive.

Be aware that managing preferences for peak day communications can refer to communications received as part of the Peak Time Rebates product or the Behavioral Demand Response product. The messaging in the Account Center is the same for both products, as utilities would only have one of these products.

To manage preferences:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. In the **Actions** area, select **Manage Communication Preferences**.
4. Perform one or more of the following actions:

Action	Steps
Update contact information	Click the **Edit contact info** link next to the recipient you want to update, and update the relevant contact information.

Action	Steps
Add a new recipient	Click **Create new recipient** and enter the contact information. A customer can add up to 10 additional recipients. Each recipient must have a name and at least one communication type. **Note** When contact information is added or updated, basic validation is used to ensure that the phone number and email address resemble real values. However, these values are not automatically tested or verified, so it is possible to enter incorrect or inaccurate information, even if it looks correct.
Remove a recipient	Click **Details** next to the recipient you want to remove to display the additional contact information, then click **DELETE CONTACT**. Any recipient other than the primary recipient can be removed.
Update communication channels	In the **Peak pricing alerts** area, update the **Email**, **SMS** (text), and **Voice** preferences. Customers cannot control print preferences.

Action	Steps
Add communications to a recipient	After you have added a recipient, you can then select the communications and alerts they receive. Click **Details** next to the appropriate recipient to display the additional details. Then, select the check boxes next to each communication you want the recipient to receive. **Note** If a recipient is added for a communication that they are not eligible to receive, then the recipient will not receive it. However, the communication will remain selected in the settings. The eligibility requirements for each communication vary by utility. If you need eligibility details, ask your supervisor or contact My Oracle Support.
Opt out a customer	Depending on the channel you want to opt out of, complete the following actions: • Under the **Peak Pricing Alerts** area, clear the checkboxes of the alerts the customer wants to opt out of. This is not permanent, and the customer can opt back in at a later time. • To instruct the customer on how to unsubscribe from **email alerts**, tell them to click the Unsubscribe link at the bottom of the email and follow the instructions to opt out. Notify the customer that opting out of peak event emails is not permanent, but opting out of all emails is a permanent action. • To instruct a customer on how to opt out of **voice notifications**, tell them to press 9 at the end of the call to unsubscribe. Notify the customer that this action is permanent. • To instruct a customer on how to opt out of text notifications, tell them to text STOP to unsubscribe. Notify the customer that this action is permanent. This option is available for Peak Time Rebates only, and is not applicable for Behavioral Demand Response.

Viewing a Sent Peak Day Communication

To more effectively answer questions about peak day communications, you can view copies that have been sent to a customer in the CSI. Peak day communications can refer to emails sent as part of either the Peak Time Rebates product or the Behavioral Demand Response product.

To view a sent peak day communication:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. On the customer's account page, look in the **Peak Day Communications** area. A list of the customer's Peak Day Communications is displayed, with the most recent one at the top. Each communication lists the type of communication, date and time it was sent, and whether it was delivered or attempted (and not successfully delivered).
4. Click on the name of the appropriate communication to view it.

Supporting Weekly Energy Updates

Weekly Energy Updates are email reports sent to customers every week to inform them of their energy usage patterns, trends, and projected energy costs.

Common Support Tasks

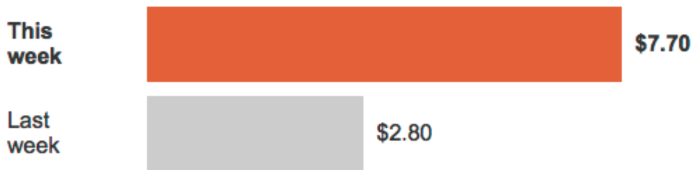
- Answer frequently-asked questions
- Manage Weekly Energy Update preferences
- View copies of sent Weekly Energy Updates

See the product overview for more information about the features and requirements of the product.

UtilityCo

Acct # ***0001

You used 175% more electricity this week.

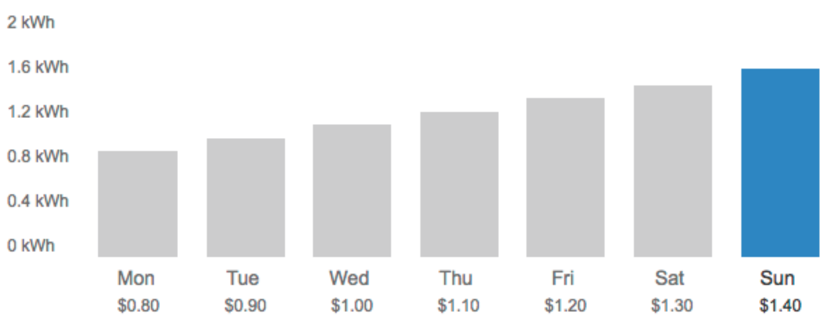


Your electricity usage to date: **$40.43**
About 15 days into your electricity bill. This is not a bill.

Cost and energy projections are estimates only, not an assurance of what your actual bill will be. Your actual bill may vary due to factors like your actual usage, taxes, and fees.

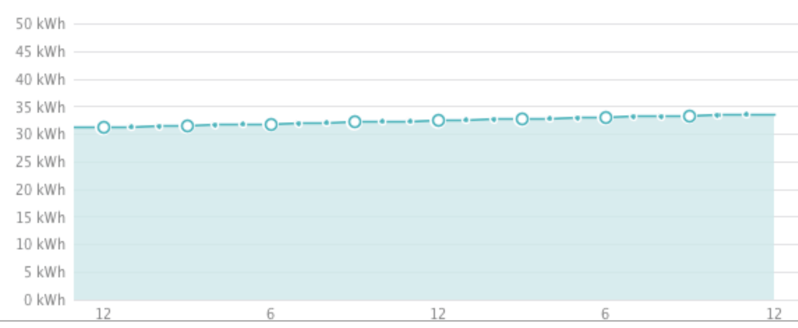
A day by day breakdown

You used the most on Sunday, Aug 11. See more



A closer look at your highest day

Sunday, Aug 11 See more details



Weekly Energy Update FAQs

Why was I selected to receive the emails?

We want to help you save energy and lower your energy bill. You are among a group of customers included in the Weekly Energy Updates program, which is designed to help meet this goal.

What is the purpose of the program?

Most people are eager to make their home more efficient and save money, but they're not always sure how. Weekly Energy Updates are designed to provide more information about your energy use so you can plan ahead, make informed choices, and save money. We welcome your feedback. Please let us know if you have comments or suggestions for improvement.

What is in the email?

Weekly Energy Updates are designed to provide regular updates about your home's energy use and help you find smart ways to make your home more efficient. Each email will provide you with information including:

Bill Projection: You can see a projection of approximately what your next bill may be, in terms of cost or usage. Our hope is that this forecast will help you to plan ahead and make informed choices to save money. To determine this value, we use your recent energy history and project it to the end of your billing period. Note that the forecast will not be exact due to rate details like taxes, fees, or changes in your usage due to weather or other factors.

Weekly Comparison: You can see a comparison of your energy usage over the last two weeks.

Day by Day breakdown: You can see a detailed breakdown of how much energy you used by day, and see how each day compares to the others during the week.

Hourly Breakdown: You can see a detailed breakdown of your energy use for your highest day to help you identify patterns and opportunities to save.

Personalized Tips: You can see tips that are tailored to your energy use and your home to help you reduce your usage.

After a bill period is completed, you can receive a Post Bill Report email, which provides deeper understanding of how much energy each of your major gas or electric end uses consumed during the month. These Post Bill Report emails include:

Weekly Comparison: You can see a comparison of your last two weeks’ energy usage and, if you have rates modeled, cost.

End Use Breakdowns: You can see a breakdown of how energy was used across end use categories during the current bill period, and what your top energy use categories are.

Always On Analysis: You can see how much of your energy use is associated with things that are "always on" in your home.

Personalized Tips: You can see tips that are tailored to your energy use and your home to help you reduce your usage.

Customers enrolled in Cost Tracker Report emails receive emails that replace the standard Weekly Energy Updates and instead show how your energy costs are tracking across the month. These Cost Tracker Report emails include:

Cost Tracker Comparison: You can see a comparison of your current bill and the same bill from last year, which shows how you are doing with regard to your energy savings challenge or goal.

Day by Day Breakdowns: You can see a detailed breakdown of how much energy you used by day, and see how each day compares to the others during the week.

Hourly Breakdowns: You can see a detailed breakdown of your energy use for your highest day to help you identify patterns and opportunities to save.

Personalized Tips: You can see tips that are tailored to your energy use and your home to help you reduce your usage.

Where can I learn more?

You can view more energy efficiency tips on the Oracle Utilities Opower web portal. There are a variety of energy efficiency tips you can browse and add to an energy-savings plan. Also, on the web portal, you may be able to update or complete your home profile in order to get more relevant tips for your home. If your utility is in the United States, the U.S. Department of Energy and the American Council for an Energy Efficient Economy are also good, independent resources for additional information on energy savings. If your utility is not in the United States, consider searching for the web site of a non-profit or government organization that works in the energy industry and is specific to your country. Such organizations typically have information and advice on how you can improve your energy efficiency.

How do you project the usage/cost for the bill period?

The actual usage or cost from the beginning of the current bill period is added to the projected energy use or cost for the rest of the bill period. The most recent usage history is used to project forward.

Does the bill projection take weather into account?

Our algorithm does not explicitly weather normalize or use weather forecasts. However, it does take weather into account in that weather in the recent past is most predictive of what the weather will be in the near future. For example, if it was very hot last week, it is likely to be very hot again this week.

Why is my forecast different in the web portal than it is in the email?

The Oracle Utilities web portal may have more recent data. There also may be minor variations due to factors like rounding.

Why does the bill forecast differ from my actual bill?

Natural variations in weather and usage patterns can easily change your projected usage and bill amounts, but other factors may cause your forecast to differ from your actual bill:

- **Rounding:** We round the forecast to the nearest $5.
- **Taxes, fees, and one-time charges:** We usually do not include taxes, fees, and other charges in the bill forecast.

- **Rate events:** Because peak day events or other event-based rate changes are unpredictable, we do not try to forecast them in our modeling of rates. Missing rate changes in our calculations could cause the forecast to be under- or over-estimated.
- **Unanticipated changes to rate plan or billing cycle:** If you change rate plans, billing cycles, or have a bill canceled and re-issued, this may cause the forecast to be inaccurate for a temporary period.

How is the email cycle related to my billing cycle?

Weekly cycles and billing cycles are independent of one another. A weekly cycle may contain the end of one billing cycle and the beginning of another.

What period of time is covered by the email?

Weekly cycles begin on Monday at 12:00:00 AM (midnight) and end on Sunday at 11:59:59 PM. This is consistent with how people typically think about weekly events, and allows you to better analyze your weekday usage compared to your weekend usage. The email is sent as close to the end of the weekly cycle as possible.

Can I opt out of this program?

Yes. You can opt out in a number of ways. The options available will depend on your utility's setup and program design.

From the web: The recommended method is to use the Digital Self Service - Energy Management Web Portal **Account and Preferences** section to change your preferences. If you unsubscribe in this way, you will be able to subscribe again in the future.

> **Note**
>
> Some utilities choose to host their own account services. If your utility does not offer the Digital Self Service - Energy Management Web Portal as part of their program, contact your utility for more information about account management.

From an email: Click the unsubscribe link at the bottom of the email and follow the instructions to opt out.

> **Warning**
>
> If you click **Unsubscribe** in the email and then click to unsubscribe from *all* emails, this action is permanent, and you will not be able to opt back in. If you click to opt out of Weekly Energy Update emails only, you can opt back in at a later time.

Can I opt back in after I have opted out?

It depends on how you opted out. If you clicked to unsubscribe from *all* emails, then you cannot opt back in. If you clicked to opt out of Weekly Energy Update emails only, then you can opt back in again. Follow these steps if you would like to opt back in:

Log in to the Oracle Utilities web portal. Click **Account & Preferences** and then look under **Manage recipients and preferences**. Find the individual whose preferences you want to change, and then expand **Message preferences**. In the Weekly Energy Updates area, select the **Email** checkbox and click **Save**.

Managing Weekly Energy Update Preferences

In the CSI, you have various options to manage communication preferences for your customers. Some options may be hidden depending on which products are provided by your utility. You may also see a message explaining that no communications for a specific type of product are available for a given customer account. Moreover, in some cases, you may be able to manage properties for products the customer is ineligible to receive.

To manage preferences:

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.
3. In the **Actions** area, select **Manage Communication Preferences**.
4. Perform one or more of the following actions:

Action	Steps
Update contact information	Click the **Edit contact info** link next to the recipient you want to update, and update the relevant contact information. If your utility is using single sign-on (SSO), the option to edit the email address is not available. In this case, you must instruct the customer to update their email address using the account setting options that your utility provides to customers.
Add a new recipient	Click **Create new recipient** and enter the contact information. A customer can add up to 10 additional recipients. Each recipient must have a name and at least one communication type. **Note** When contact information is added or updated, basic validation is used to ensure that the phone number and email address resemble real values. However, these values are not automatically tested or verified, so it is possible to enter incorrect or inaccurate information, even if it looks correct.

Action	Steps
Remove a recipient	Click **Details** next to the recipient you want to remove to display the additional contact information, then click **DELETE CONTACT**. Any recipient other than the primary recipient can be removed.
Update communication channels	In the **Weekly energy updates** area, update the **Email** preference. The **Weekly energy updates** area is hidden from customers that do not have AMI data.
Add a communication to a recipient	After you have added a recipient, you can then select the communications and alerts they receive. Click **Details** next to the appropriate recipient to display the additional details. Then, select the check boxes next to each communication you want the recipient to receive. **Note** If a recipient is added for a communication that they are not eligible to receive, then the recipient will not receive it. However, the communication will remain selected in the settings. The eligibility requirements for each communication vary by utility. If you need eligibility details, ask your supervisor or contact My Oracle Support.
Opt a customer out	In the **Weekly energy updates** area, clear the **Email** checkbox. Customers can also unsubscribe from the header or footer of email alerts directly.

Viewing a Sent Weekly Energy Update

To more effectively answer questions about Weekly Energy Updates, you can view copies that have been sent to a customer.

To view a sent Weekly Energy Update**:**

1. Sign in to the Customer Service Interface.
2. Find and open the customer's account.

3. On the customer's account page, look in **Customer Alerts**. A list of the customer's alerts and/or Weekly Energy Updates (marked as Weekly AMI) is displayed, with the most recent one at the top. Each communication lists the type of communication, date and time it was sent, and whether it was delivered or attempted (and not successfully delivered).
4. Click the name of the appropriate email to open an HTML version of it.