



AFFORDABLE ENERGY SUMMIT

Wednesday, July 25, 2018



AT&T Executive Education & Conference Center
1900 University Avenue
9:00am - 4:30pm



Introduction to Information Request

Fred Desoto, Customer Assistance Program Supervisor, Austin Energy



Is Customer Information gathered by Austin Energy considered confidential?

- Texas Attorney General issued ruling OR2011-14511 recognizing electric information is protected and confidential
- Texas Utility Code 182.052 further states customers have rights to confidentiality in government-operated utilities



Why is data protected?

- Protects our customers from fraud
- Competitive Matters protection for utility (Section 522.133 Government Code)
 - Doesn't give competitors an advantage of our infrastructure
- State Law requires government utilities to protect certain information
- Prevents others from identifying or locating individuals



What is considered customer information?

Information in the City of Austin utility billing system (552.133(b) Government Code)

- PII data
- Address/Phone Numbers
- Electric Usage
- Payment history
- Electric Billing history
- Service Start / Stop history



Why is water usage not considered protected information like electricity?

Natural finite resource



Can I protect my water utility information?

SPECIAL NOTICE

RIGHT OF CONFIDENTIALITY OF PERSONAL INFORMATION

Section 182.052 of the Texas Utilities Code requires government-operated utilities to notify customers of their right to confidentiality. You are hereby informed that you have the right to request confidentiality of your address, telephone number, social security number and any information relating to the volume or units of utility usage and the amounts billed to or collected from you for utility usage, as contained in our records.

Please be aware that if you requested confidentiality in the past, you also have the right to cancel that request for confidentiality. To exercise your rights, please complete the information requested on this form, tear off at dotted line and place in an envelope and return it to the address below.

If you have requested confidentiality of your account information in the past, you do not need to resend.

- I hereby request confidentiality.
- I hereby cancel my request for confidentiality and give permission to disclose my information.

Name _____

Acct. Number _____

Signature _____

Date _____

Mail To: City of Austin Utilities
P.O. Box 2267
Austin, Texas 78783-2267

Please call **512-494-9400**
if you have questions.

0615sp



Confidentiality Agreement Form

What is a customer information request?

Customer requesting data from their own account

- No release necessary
- Confirmation by validating ID on account
- 12 most current months available online
- 13 months and on considered historical
- Fee may apply



Can a customer delegate someone else to receive their account customer information?

- Release of Information (RIA) policy allows customers to grant others account access
 - Customer Information Requests
 - Government Information Requests
- Proper City of Austin Authorization Form -Release of Information Form
- Power of Attorney
- Attorney Representation
- Verbal Release



What is a government information request?

A partner, government agency or other like third party requesting customer data from an Austin Energy account

- Release of Information necessary
- Confirmation by validating customer signature on form
- 12 most current months available online
- 13 months and on considered historical
- Fee may apply



What do I do as a governmental entity to access my customer's account information?

- Requestor must have a Release of Information (RIA) on file
- 72 business hour turn around
- Incomplete RIA's will be denied
- Faxed to (512) 505-4020
- Emailed to: [AEGovInfoRequest@austinenergy.com](mailto: AEGovInfoRequest@austinenergy.com)





Please FAX completed form to:
 Austin Energy at (512) 505-4020
 If you have questions please call (512) 494-9400



Release of Customer Information Authorization Form

PURPOSE: This Release of Customer Information Authorization Form allows a City of Austin utility account holder ("Account Holder") to delegate certain rights to an authorized party ("Authorized Party") concerning account holder's service(s), including authorizing receipt of confidential customer account information. This form must be completed in its entirety and signed by the Account Holder or by someone who has legal authority to bind the Account Holder.

AUTHORIZATION: I, _____ (*printed name*), state that I am the City of Austin ("City") utility services Account Holder and hereby request and authorize the City to release my utility customer account information to:

Authorized Party: _____
 Address: _____
 Phone Number: _____ Fax Number: _____
 Email Address: _____

The scope of access to my account information is authorized as follows:
 (*Account Holder must initial Restricted or Unrestricted*)

_____ Limited Access Authorized Party may do the following: (*check any or all that apply*)

- Usage and Financial Information Only
- Usage and Financial Access
- Facilities / Property Management Access
- Account Manager

Other: _____

_____ Full Access Authorized Party may conduct any transactions and receive any information regarding my utility service account.

This authorization is valid for:
 (*Account Holder must initial*)

_____ One-time only-Authorized Party is granted access one time.

_____ One year period-Authorized Party is granted access for twelve months from the date of execution of this form.

_____ Date specific-Authorized Party is granted access until (date).

_____ Account closes-Authorized Party is granted access until the utility account is closed.

* If no time period is specified, authorization will be limited to a one-time authorization

Release of Information Form

- An Authorized Party
- The Scope of the access
- The Term of access



I request that the City provide information to the Authorized Party in the format checked below, but I understand the City will provide the information in the format it deems most appropriate.
(check all that apply)

- Hard copy via US Mail *(if applicable)* _____
- Facsimile to telephone number: _____
- Electronic mail to email address: _____
- On-Line Customer Care Access: _____
- Telephone at: _____

I understand that this Authorization does not require the City to release information, and the City retains the right to verify any authorization request submitted before releasing information or taking any action.

I hereby release, hold harmless, and indemnify the City from any liability, claims, demands, and causes of action, damages, or expenses resulting from:

- 1) any release of information pursuant to this Authorization;
- 2) the unauthorized use of this information by the Authorized Party; and
- 3) any actions taken by the Authorized Party pursuant to this Authorization.

I understand that I may cancel this Authorization at any time by notifying the City in writing. I acknowledge I am signing this Authorization under my own free will and not under duress. I certify that the authorized party does not benefit from utilities at the service address listed.

Account Holder's Signature _____ Date: _____

Account Holder's Printed Name _____

Account Holder's Identification:

Social Security Number _____ - _____ - _____

or Driver's License Number _____

or Tax Identification Number _____

or Other Identification Number _____

Utility Service Address: _____

Utility Service Account Number: _____

Account Holder Daytime Phone Number: _____

Release of Information Form

- Account Holder's name
- Account Holder's signature
- Valid ID
- Account number or address



What is an open / public Information request?

Requests for City of Austin records not found in the City of Austin billing system

- Contracts
- Financial Records
- Operating Data
- Personnel Files
- Emailed to: public.information@austintexas.gov
- Online form: www.austintexas.gov/public-information-request



Escalations

Tiffani Webb, Customer Solutions Manager, Austin Energy



Customer Solutions: Escalations

Who we are: The Escalations team is a group within Customer Services Management that receives investigation requests from Customer Care and various other City Departments.

What we do: This team conducts high level analysis and provides direct one on one support to customers during a dispute.

- Customer Escalations
- Administrative Reviews
- Administrative Hearings



Escalations

Customer Escalations are received through multiple channels, the Utility Contact Center, Executives, City Council and various Government offices.

Types of Escalations:

Bill Dispute	Solar Billing & Consumption
High Electric/Water Disputes	Severance/Payment Arrangements
Electric/Water Meter Tampering	Executive Level Escalations
Water High Volume Administrative Adjustments	Deceased Account Holder Investigation
Meter Issue Investigations	Administrative Hearing Requests



Administrative Reviews

An **Administrative Review** is completed as part of the Dispute/Escalation process.

Administrative reviews consist of:

Customer Contact

- Utility Contact Center
- Executive Level
- City Council
- Government offices

Customer Solutions Review/Analysis

- Financial History
- Consumption History
- Field Activities
- Premise History
- Tampering

Close out Administrative Review

- Customer Contact
- Admin Review Findings
- Payment Options
- Conservation Discussions/referrals



Administrative Hearings

An Administrative Hearing provides customers the option to present items such as bill disputes, balance transfers, meter tampering, and high consumption to a third party, independent hearing officer for review.

The Customer Solutions team is responsible for scheduling and coordinating hearings for various City of Austin Departments such as:

- Austin Energy
- Austin Water
- Water Conservation
- Watershed Protection
- Code Compliance
- Austin Police Department
- Animal Control



Questions?

