

## **ENROLLMENT INSTRUCTIONS**

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Suppliers participating in Choices For You<sup>sm</sup> for both Peoples Gas & North Shore Gas companies will be assigned Pool Numbers that are distinctive for each company. The customers from each utility have to be viewed separately, therefore, when using the following Ledgers and Reports, Suppliers will have to "Filter" between PGL and NSG when applicable.

### **Overview:**

Suppliers enroll and terminate customers and amend accounts in the Choices For You<sup>sm</sup> program using PEGASys<sup>®</sup>. The Supplier needs the account number to enroll, to terminate or amend an account.

Peoples Gas and North Shore Gas will maintain a 'No Supplier Contact' list of customers who have requested that suppliers no contact them. The list will be posted in PEGASys<sup>®</sup> and will be updated on the first business day of each calendar month.

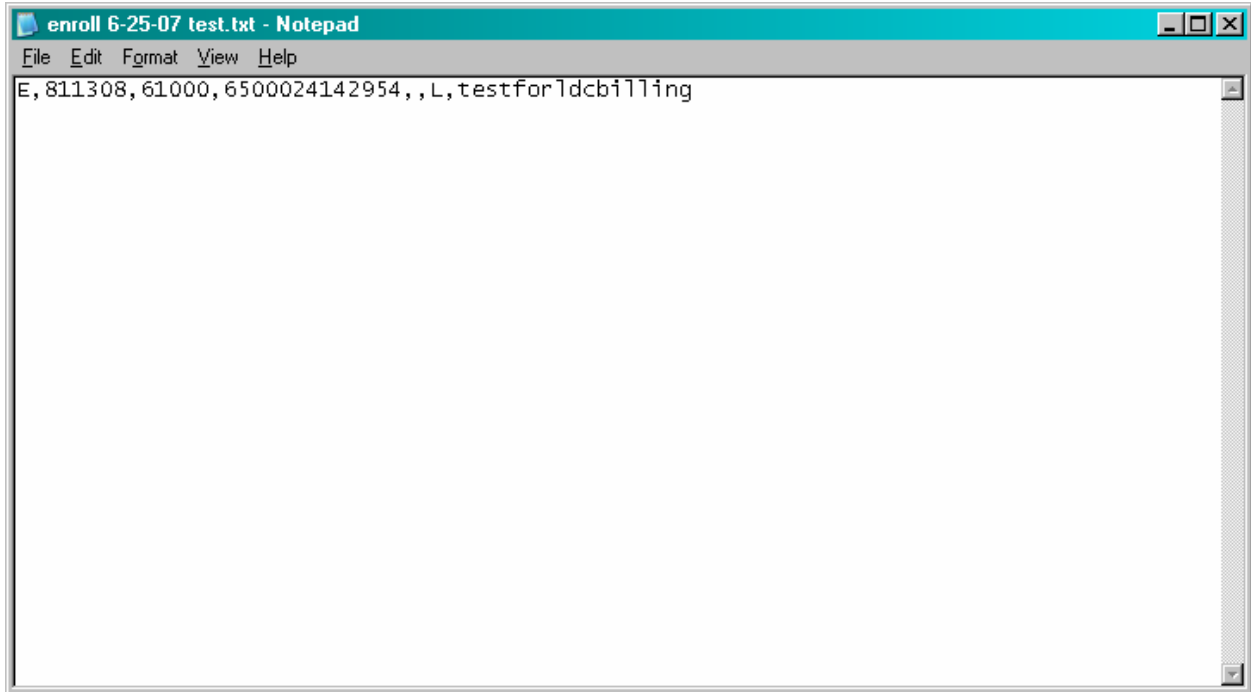
PEGASys<sup>®</sup> is also used by Choices For You<sup>sm</sup> Suppliers to identify those accounts to be billed under the LDC Billing Option. Suppliers with a signed Billing Services Contract on file with Peoples Gas or North Shore Gas can mark those accounts that would have the Choices For You<sup>sm</sup> Supplier charges included on their utility bill. Accounts either can be marked at the time of enrollment or can be amended after enrollment.

The basic steps to submit an enrollment, termination, or amend include:

1. Suppliers enter the requests through the Choices For You<sup>sm</sup> Add Enrollment Panel by 4pm each Business Day.
2. The Utility runs verification on each request. Various tests are performed to check the account's eligibility.
3. The Status for each request will be updated by 8a.m. the next Business Day. Suppliers can view all requests through the Choices For You Enrollment Ledger or by running the C for U Accepted Enrollment Report or C for U Rejected Enrollment Report.
4. Choices For You<sup>sm</sup> Suppliers will receive account information with each Accepted request.
5. Reasons will be given for all Rejected requests.

**Choices For You<sup>sm</sup> Enrollment File Import:**

PEGASys<sup>®</sup> will accept enrollment requests exported from your current customer management system. In order to use this feature you must create an enrollment text file.



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A text file can contain multiple combinations of enrollment requests for multiple accounts – enroll, terminate, or amend. If the same enrollment request is entered for the same account more than once in a given day, all requests will be submitted. The first instance of the enrollment request will be processed. Assuming that it is put into Accepted Status, the remaining instances of the same request will be put into Rejected Status.

These file layouts will appear as stated if the file is saved in a CSV (comma delimited) file format. If you choose any other file format, the field layouts may vary depending on the Save As type selected.

**File Layouts:**

The file could contain the following 3 record types. These are:

- 1) **E = Enroll Account transaction record**
- 2) **T = Terminate Account transaction record**
- 3) **A = Amend Account transaction record**

<b>Enroll Account transaction record</b>		
Transaction required to add an account to the Supplier's Contract (or Pool).		
<b>Notes:</b>	Zero or more records. Record should be comma delimited.	
<b>Record Format:</b>	<b>E,XXXXXX,CCCC,AAAAAAAAAAAAA,,B,NOTES</b>	
	Where: E = Record Type XXXXXX = Marketer Number CCCCC = Contract Number AAAAAAAAAAAAAA = Account Number B = Billing Option Indicator NOTES = Subscriber Notes	
<b>Field Content:</b>	<b>Name:</b>	<b>Content:</b>
	Record Type	'E' 1 character constant
	Marketer Number	6 numeric digits
	Contract Number	5 numeric digits
	Account Number	9-13 numeric digits
	Billing Option Indicator	D, L, or S*
	Notes	Optional: 0-200 alpha numeric spaces

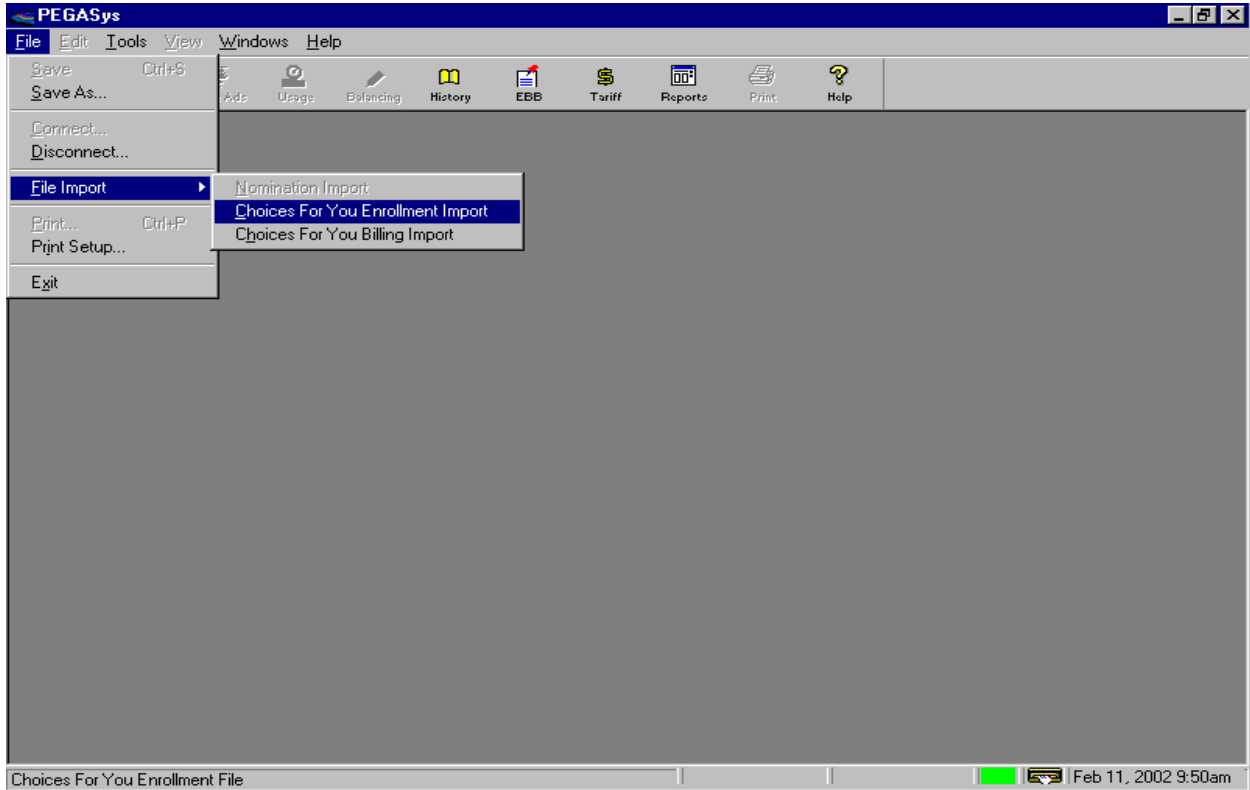
\*Billing Option "S" will not be available until 10-02

<b>Terminate Account transaction record</b> Transaction required to remove an account from a Supplier's Contract (or Pool).		
<b>Notes:</b>	Zero or more records. Record should be comma delimited.	
<b>Record Format:</b>	<b>T,XXXXXX,CCCC,AAAAAAAAAAAAA,NOTES</b>  Where: T = Record Type XXXXXX = Marketer Number CCCCC = Contract Number AAAAAAAAAAAAAA = Account Number NOTES = Subscriber Notes	
<b>Field Content:</b>	<b>Name:</b>	<b>Content:</b>
	Record Type	'T' 1 character constant
	Marketer Number	6 numeric digits
	Contract Number	5 numeric digits
	Account Number	9-13 numeric digits
	Notes	Options: 0-200 alpha numeric spaces

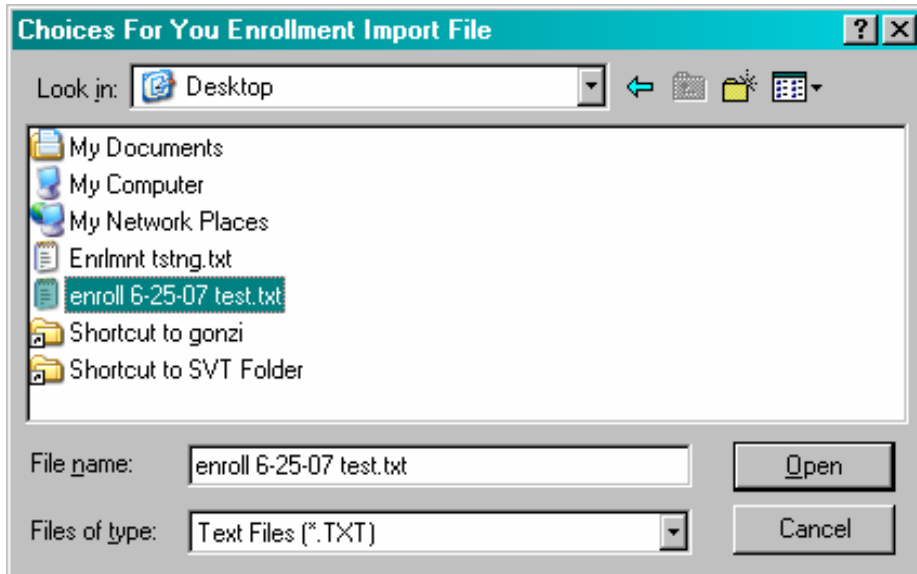
<b>Amend Account transaction record</b> Transaction required to change the Billing Option Indicator to "D" Dual Billing, "L" LDC Billing, or "S" Supplier Single Billing (not available until 10-2002).		
<b>Notes:</b>	Zero or more records; one row per account that Marketer would like to amend the Billing Option Indicator. Record should be comma delimited.	
<b>Record Format:</b>	<b>A,XXXXXX,CCCC,AAAAAAAAAAAAA,B,NOTES</b>  Where: A = Record Type XXXXXX = Marketer Number CCCCC = Contract Number AAAAAAAAAAAAAA = Account Number B = Billing Option Indicator NOTES = Subscriber Notes	
<b>Field Content:</b>	<b>Name:</b>	<b>Content:</b>
	Record Type	'A' 1 character constant
	Marketer Number	6 numeric digits
	Contract Number	5 numeric digits
	Account Number	9-13 numeric digits
	Billing Option Indicator	D, L, or S*
	Notes	Options: 0-200 alpha numeric spaces

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To import the text file into PEGASys® use the 'Choices For You<sup>sm</sup> Enrollment Import' option located within File Import under File on the Menu Bar.



Locate the appropriate text file to import and then click 'Open'.



**Data Validation:**

To verify all information is entered correctly, the system will validate the data. If the import file is incorrectly formatted, the following errors may occur.

During validation of data for the record types:

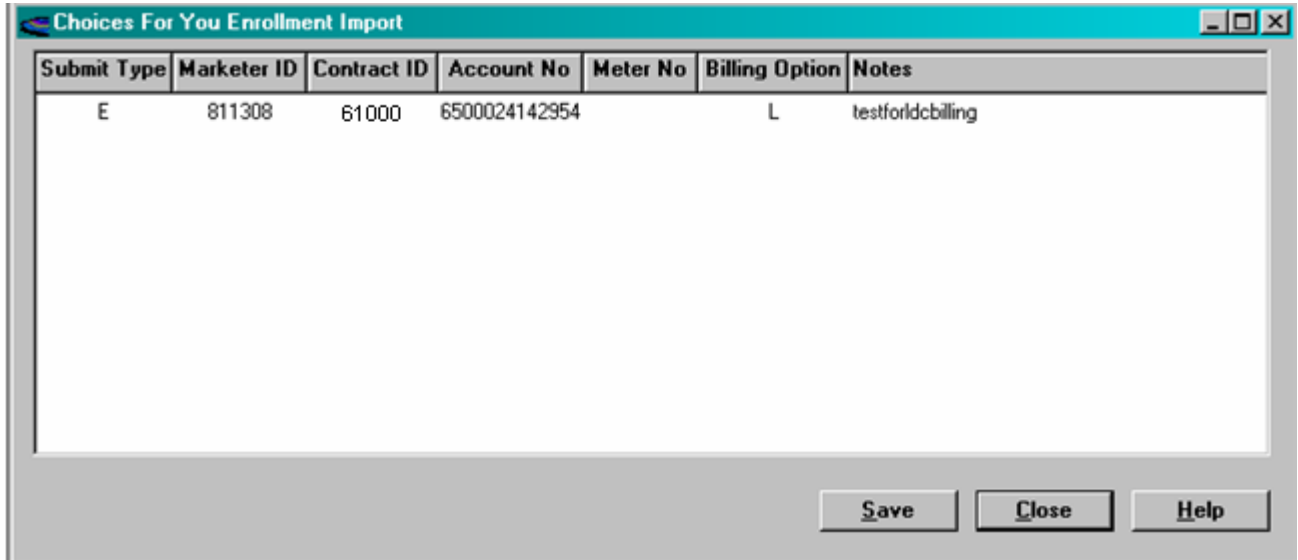
- Invalid format of record
- Invalid Record Type (must be E, T, or A)
- Invalid Contract Number (external users can only import a file with their own marketer number)
- Invalid Account Number (must be 9-13 numeric digits)
- Invalid Billing Option Indicator (must be D, L, or S)
- Invalid Notes (cannot exceed 200 characters)

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If the Import works correctly, the Choices For You Enrollment Import panel will appear:

1. Click 'Save'
2. Then Click 'Close'.

The enrollment requests will be inputted into the Enrollment Ledger and set to Pending Status.

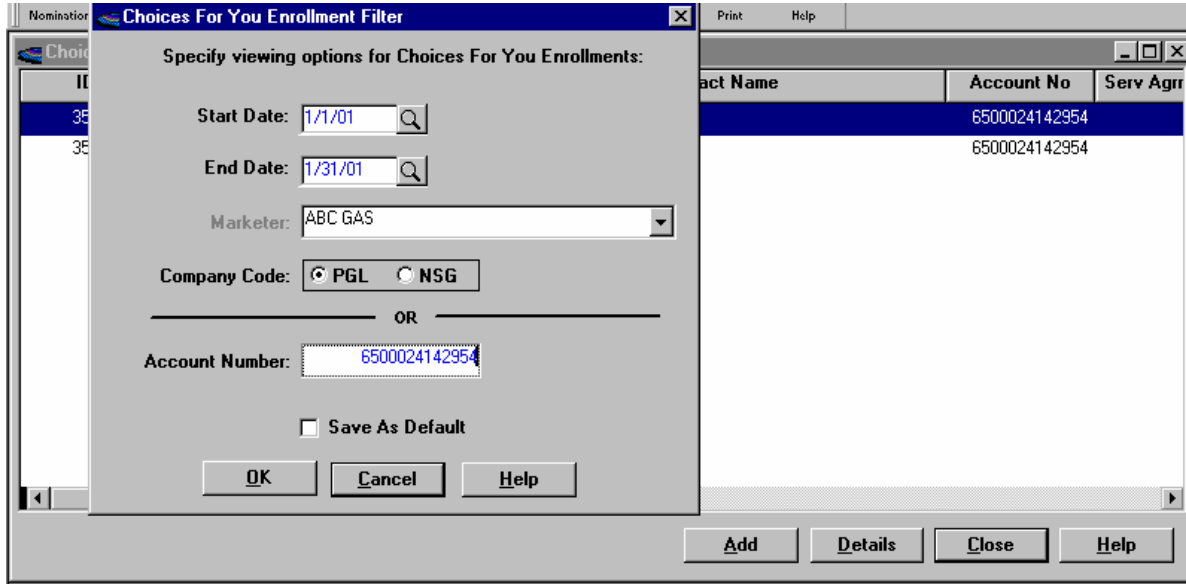


**Viewing Transactions**

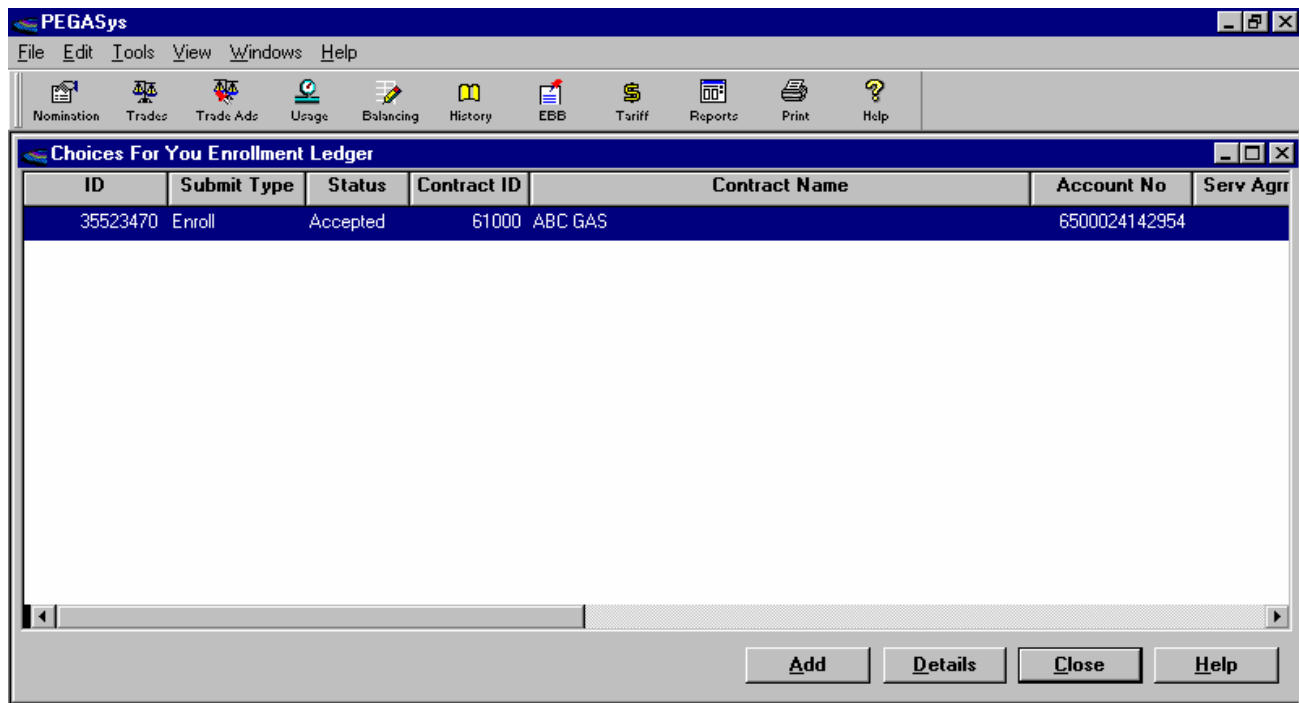
After the file import completes successfully, transactions can be viewed and /or edited in the Choices for You<sup>sm</sup> Enrollment Ledger. Transactions can only be edited or deleted through the Enrollment Ledger and only while the transactions are in Pending Status.

**Choices For You<sup>sm</sup> Enrollment:**

Choose 'Choices for You<sup>sm</sup> Enrollment' under Tools on the Menu Bar. Enrollment Filter will appear



The Choices for You<sup>sm</sup> Enrollment Ledger can be filtered by either the Submit Date or a specific account number. Once you click 'OK' the appropriate account(s) will be displayed in the Enrollment Ledger.



To Enroll, Terminate, or Amend an account, select the 'Add' button at the bottom of the Enrollment Ledger or by choosing 'Add a C for U Enrollment' under Edit on the Menu Bar. The Choices For You<sup>sm</sup> Add Enrollment panel will be displayed.

In the Choices for You<sup>sm</sup> Add Enrollment panel you can either Enroll an account into your pool, Terminate an account from your pool, or Amend the Billing Option for an active account. Once you choose the Submit Type, the required fields will remain open.

To **Enroll** an account you must:

- Choose a Contract (or Pool). If you only have one valid Contract that Contract will be the default.
- Input the Account Number for the customer.
- Choose the Billing Option.

To **Terminate** an account you must:

- Choose a Contract (or Pool). If you only have one valid Contract that Contract will be the default.
- Input the Account Number for the customer.

To **Amend** an account you must:

- Choose a Contract (or Pool). If you only have one valid Contract that Contract will be the default.
- Input the Account Number for the customer.
- Choose Dual Billing, LDC Billing or Single Bill\* for the Billing Option.

If you leave one of the required fields empty the enrollment request cannot be processed and you will receive an error when you choose to 'Save' the request.

The Notes field is used by PGL/NSG to communicate the following messages to Choices For You<sup>SM</sup> Suppliers:

- Customer switching Suppliers.
- Supplier switch was not processed.
- Account terminated prior to becoming active.
- Enrollment accepted pending an actual meter read within 30 days.
- Actual meter read was received – enrollment was processed.
- Actual meter read was not received within 30 days of initial enrollment request.
- Customer’s account no longer active.
- Supplier not certified to service customer.
- Ineligible account. Annual Usage exceeds 50,000 therms.

The SA Number is used by Peoples Gas or North Shore Gas for internal purposes and cannot be edited.

Once you ‘Save’ a request (Enroll, Terminate, or Amend), the Choices For You<sup>SM</sup> Add Enrollment panel will reset all fields except the Marketer, Submit Type, and Contract. You can choose a different Submit Type and/or Contract.

Once you ‘Close’ the Choices For You<sup>SM</sup> Add Enrollment panel the Enrollment Ledger will be populated with the requests that were entered. These requests will remain in Pending Status until they are processed by the Utility after 4pm each Business Day. Processing will result in the request status changing to ‘Submitted’, ‘Accepted’, or ‘Rejected’, as explained in detail below.

A request can be edited or deleted only while in Pending Status. Requests in Submitted, Accepted, or Rejected Status cannot be edited or deleted. To edit a Pending request, highlight it and choose ‘Edit a C for U Enrollment’ under Edit on the Menu Bar. To delete a request, highlight it and either hit the ‘Delete’ key on your keyboard or choose ‘Delete a C for U Enrollment’ under Edit on the Menu Bar.

Details of all requests can be viewed in the Choices for You<sup>SM</sup> Enrollment Detail panel. To do so, highlight the request and click on the ‘Details’ button at the bottom of Enrollment Ledger.

ID	Submit Type	Status	Contract ID	Contract Name	Account No	Serv A
35523467	Enroll	Rejected	61000	ABC GAS	1500024142947	
35523468	Enroll	Accepted	61000	ABC GAS	9500028308151	
35523469	Enroll	Rejected	61000	ABC GAS	9999999999999	
35523470	Enroll	Accepted	61000	ABC GAS	6500024142954	
35523471	Enroll	Rejected	61000	ABC GAS	7500024142935	
35523472	Enroll	Accepted	61000	ABC GAS	7500024143003	
35523473	Enroll	Rejected	61000	ABC GAS	1500024143014	
35523474	Enroll	Accepted	61000	ABC GAS	2500024142990	
35523475	Enroll	Accepted	61000	ABC GAS	5500024143110	
35523482	Enroll	Accepted	61000	ABC GAS	6500024142954	
35523483	Enroll	Accepted	61000	ABC GAS	2500024142990	
35523484	Enroll	Accepted	61000	ABC GAS	5500024143110	

For all requests, the top section of the Choices for You<sup>SM</sup> Enrollment Detail panel will display the information submitted by the Supplier. The information in the Detail box will include information returned to the Suppliers from Peoples Gas.

**Choices For You Enrollment Detail**

Status: Accepted    Submit Date: 10/22/01    Enrollment ID: 35523468

Marketer: ABC GAS

Submit Type:  Enroll     Terminate     Amend

Contract: 61000    ABC GAS

Account Number: 9500028308151    SA Number: 1

Billing Option: LDC Billing

Notes: Enrollment accepted pending an actual meter read within 30 days test for 120 day meter read reject

**Accepted Detail**

SVT ID: 176147

Customer Name: KIDD    BILLY

Service Address: 666 E RANDOLPH ST  
 CHICAGO, IL 60601-6207  
 CHICAGO, IL 60614-1550

Estimated Effective Date: 10/23/01

Bimonthly Bill Ind: No

Rate: P2SV

Account No	Serv A
1500024142947	
9500028308151	
9999999999999	
6500024142954	
7500024142935	
7500024143003	
1500024143014	
2500024142990	
5500024143110	
6500024142954	
2500024142990	
5500024143110	

If an account is in **Accepted Status**, the Detail box will display the following information:

- **SVT Id:** This number will be unique to this customer. The SVT Id is no longer used.
- **Customer Name:** This is the name of the customer on record with Peoples Gas.
- **Service Address1:** This is the street address where the customer is receiving service from Peoples Gas.
- **Service Address2:** This is the address (city-state and zip code) where the customer is receiving service from Peoples Gas.
- **Billing Address1:** This is the street address where the customer's UTILITY bill is sent. Per the terms of Rider SVT, the Billing Address cannot be that of the SVT Supplier. If a Billing Address is not returned, then the Billing Address is the same as the Service Address.
- **Billing Address2:** This is the address (city-state and zip code) where the customer's UTILITY bill is sent. Per the terms of Rider SVT, the Billing Address cannot be that of the Choices For You<sup>sm</sup> Supplier. If a Billing Address is not returned, then the Billing Address is the same as the Service Address.
- **Estimated Effective Date:** This is the estimated date for the account's next meter read. The actual meter read date could be up to two days after the Estimated Effective Date. Any changes to the customer's account (Enroll, Terminate, or Amend) will be effective on the meter read date following the request.
- **Bimonthly Bill Ind:** This indicates if the customer receives a bill from the Utility every month or every two months (bimonthly billed).
- **Rate:** Description of the current service classification.

If an account is in **Rejected Status**, the Detail box will display a Reason Code and Description. Listed below are the possible Rejection Reasons:

- 10500 Not a PGL/NSG account.
- 10501 Account is not in 'Active' status.
- 10502 Nonexistent account number.
- 10503 Nonexistent meter number.
- 10504 Active account/meter number combination does not exist.
- 10505 Ineligible account – Not a customer.
- 10506 No service agreement exists for the account.
- 10507 Ineligible account – Annual usage exceeds 50,000 therms.
- 10508 An account that is currently in a summary billing relationship may not be on LDC billing.
- 10509 Ineligible account – Currently under large volume contract obligation.
- 10510 Ineligible account – Pending enrollment under large volume contract obligation.
- 10511 Ineligible account – No valid meter reading within the previous 120 days.
- 10512 Account is already enrolled in this pool.
- 10513 Account is pending Add status in another pool.
- 10514 Account is not enrolled in this pool.
- 10515 Account is already pending to terminate from this pool.
- 10516 Account is already terminated from this pool.
- 10517 Ineligible account – Less than 12 months since previous termination from Choices For You<sup>sm</sup> program.
- 10518 Billing Option not valid for this pool.
- 10519 Account number does not exist in SVT system.
- 10520 Ineligible account – Currently under levelized + short term agreement payment plan.
- 10521 Bill/Read cycle change required. Call the Supplier Hotline at (800) 264-8026.
- 10522 Ineligible account – Large Volume contract has no scheduled expiration date – call the Supplier Hotline at (800) 264-8026.
- 10523 No billing history exists for this account.
- 10524 Billing option not available for this pool.
- 10525 Company associated with pool and company associated with account are in conflict.

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- 10526 Ineligible account. Not a rate 1 or rate 2 customer.
- 10527 PGL rate 1 enrollment limit has been reached. No additional PGL rate 1 enrollments will be accepted until further notice.
- 10528 NSG rate 1 enrollment limit has been reached. No additional NSG rate 1 enrollments will be accepted until further notice.
- 10599 Internal system error – Contact PGL/NSG.

If an account is in **Pending Status** or **Submitted Status**, the Detail Box will be empty. The account will remain in Pending Status until it is sent to our internal systems for processing. In the rare instance that the account appears in Submitted Status, the request has been received, but has not been processed. Once processed, all requests will have a final status of either Accepted or Rejected.

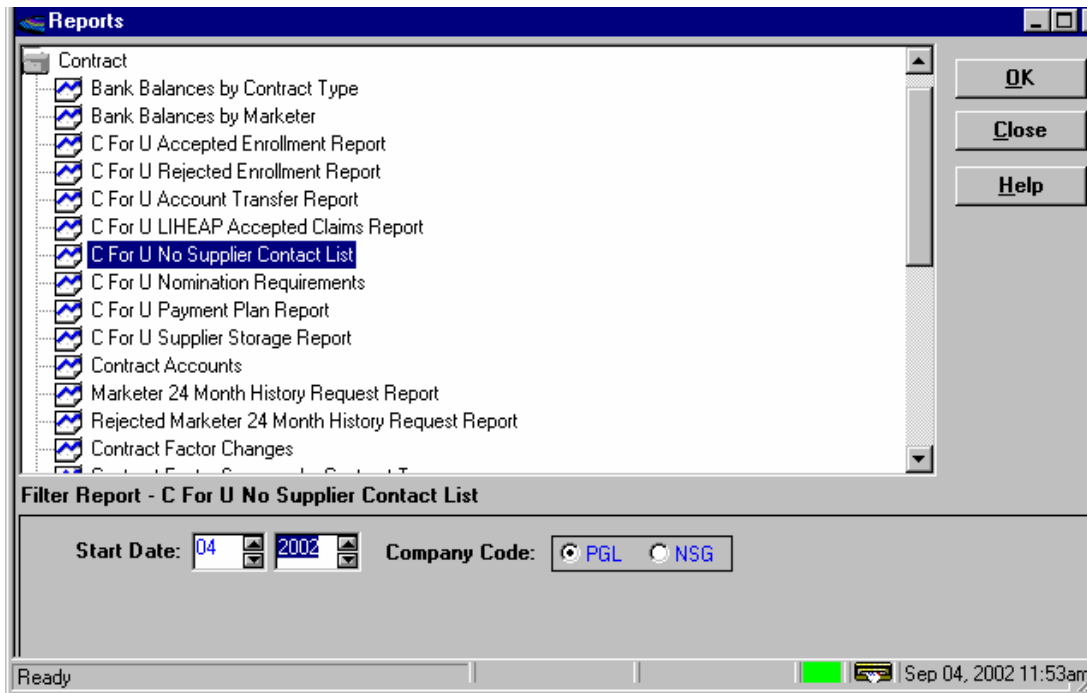
**Reports:**

Choose the 'Reports' button on the Tool Menu. All Choices For You<sup>SM</sup> related reports can be found in the Contract category. Double Click 'Contract' from the Reports list.

All reports can be exported as an Excel, Lotus, or other document type. Choose 'Save As' under File on the Menu Bar.

**C For U No Supplier Contact List**

These customers have requested that Choices For You Suppliers not contact them directly. To view this report, highlight the C For U No Supplier Contact List. The report can be filtered by choosing the calendar month and the company (PGL or NSG).



Click 'OK' and the C For U No Supplier Contact List will be displayed.

PEGASys - [Report Display - C For U No Supplier Contact List]

File Edit Tools View Windows Help

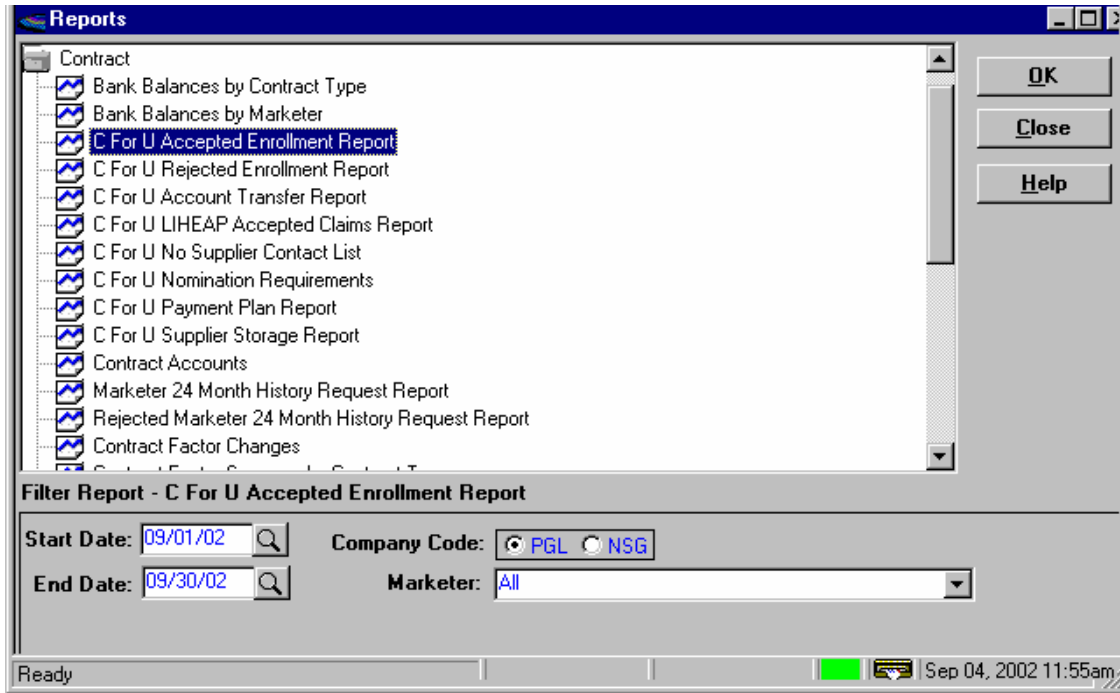
Nomination Trades Trade Ads Usage Balancing History EBB Tariff Reports Print Help

Start Date: April, 2002  
 Company: PGL

Customer Name	Month	Mailing Address	Mailing City, State	Mailin
DAVID LITCHMAN	4/2002	1001 GREENBAY RD	WINNETKA IL	60093-1
GRIFFIN SHIRLEY	4/2002	9218 S ABERDEEN ST	CHICAGO, IL	60620-3
COMM GRINDING WHEEL DIV OF GRIER ABA	4/2002	4507 W ARMITAGE AVE	CHICAGO, IL	60639-3

**C for U Accepted Enrollment Report**

To view all enrollment requests in Accepted Status highlight the C for U Accepted Enrollment Report. The Filter options for the report are displayed at the bottom of the panel. You can filter on the date the enrollment request was submitted using a date range. The date range cannot exceed 31 days.



Click 'OK' and the C for U Accepted Enrollment Report will be displayed.

PEGASys - [Report Display - C For U Accepted Enrollment Report]

File Edit Tools View Windows Help

Nomination Trades Trade Ads Usage Balancing History EBB Tariff Reports Print Help

Start Date: 10/1/01 End Date: 10/24/01  
 Company: PGL  
 Marketer: ABC GAS

ID	Submit Type	Submit Date	Contract ID	Contract Name	Account No	Meter No	Billing Option
35523468	Enroll	10/22/01	61000	ABC GAS	9500028308151		LDC Billing
35523470	Enroll	10/22/01	61000	ABC GAS	6500024142954		Agency Billing
35523472	Enroll	10/22/01	61000	ABC GAS	7500024143003		LDC Billing
35523474	Enroll	10/22/01	61000	ABC GAS	2500024142990		Dual Billing
35523475	Enroll	10/22/01	61000	ABC GAS	5500024143110		Dual Billing
35523482	Enroll	10/23/01	61000	ABC GAS	6500024142954		Agency Billing
35523483	Enroll	10/23/01	61000	ABC GAS	2500024142990		Dual Billing
35523484	Enroll	10/23/01	61000	ABC GAS	5500024143110		Dual Billing
35523485	Enroll	10/23/01	61000	ABC GAS	7500024142935		Agency Billing
35523476	Enroll	10/23/01	61000	ABC GAS	1500024142947		LDC Billing
35523477	Enroll	10/23/01	61000	ABC GAS	1500028308105		LDC Billing
35523478	Enroll	10/23/01	61000	ABC GAS	500024143103		LDC Billing
35523479	Enroll	10/23/01	61000	ABC GAS	7500024142935		Agency Billing
35523481	Enroll	10/23/01	61000	ABC GAS	9500024143126		LDC Billing

Print Close Help

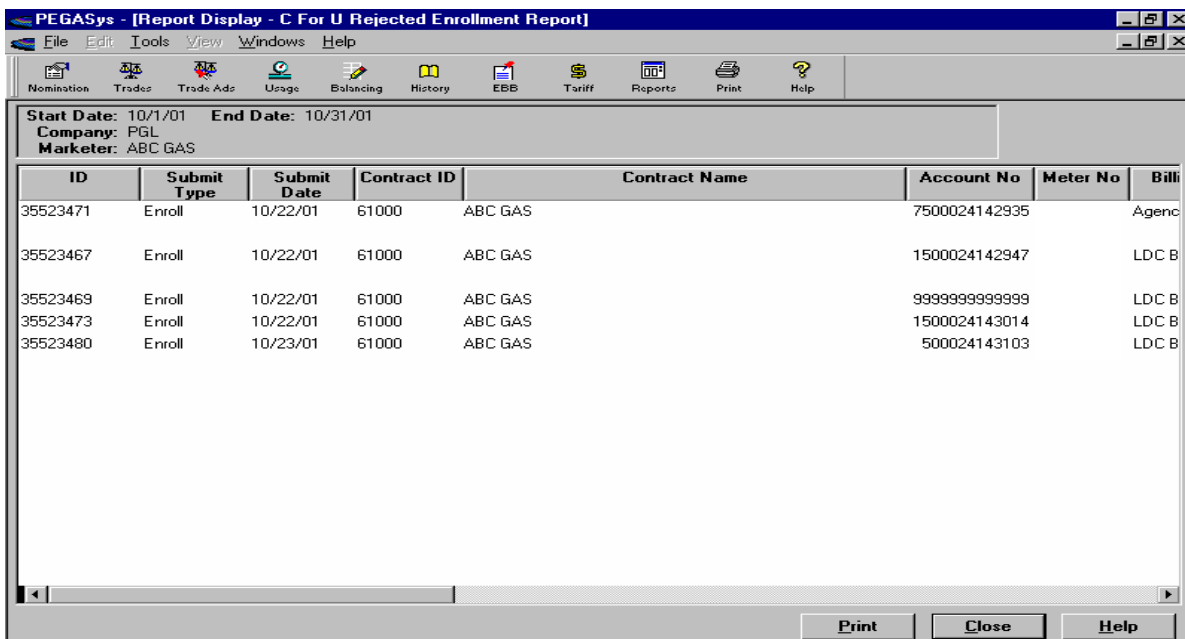
Ready | Apr 22, 2002 3:42pm

**C for U Rejected Enrollment Report**

The C for U Rejected Enrollment Report will list all enrollment requests in Rejected Status. The Filter options for the report are displayed at the bottom of the panel. You can filter on the date the enrollment request was submitted using a date range.

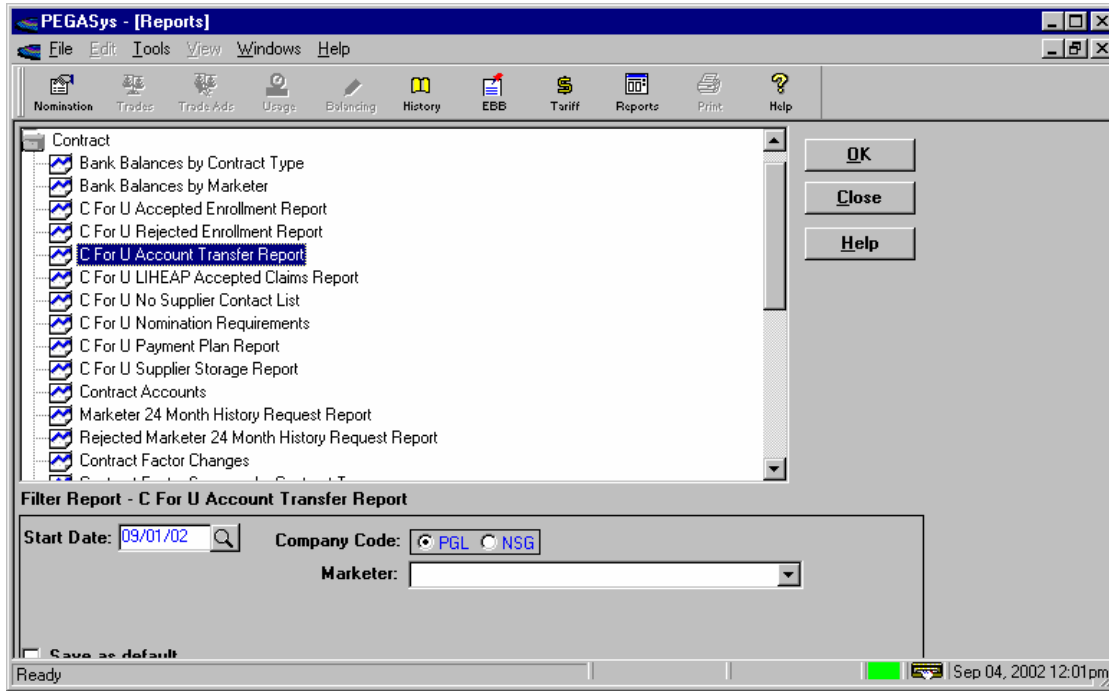


Click 'OK' and the C for U Rejected Enrollment Report will be displayed.

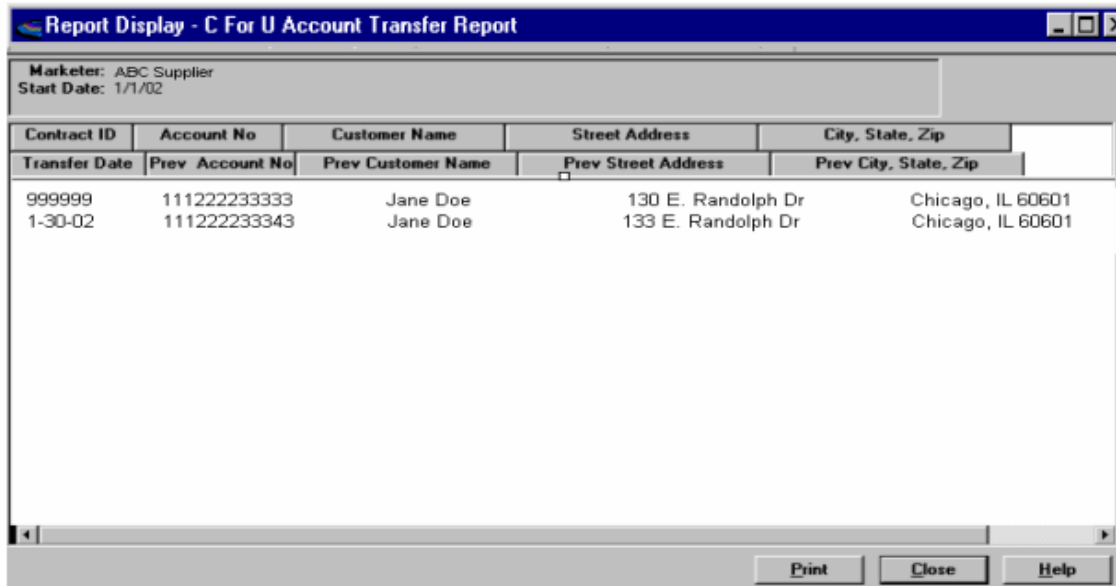


**C for U Account Transfer Report**

The C for U Account Transfer Report will list all customer accounts that have moved, displaying their previous and new account information. The Filter options for the report are displayed at the bottom of the panel.

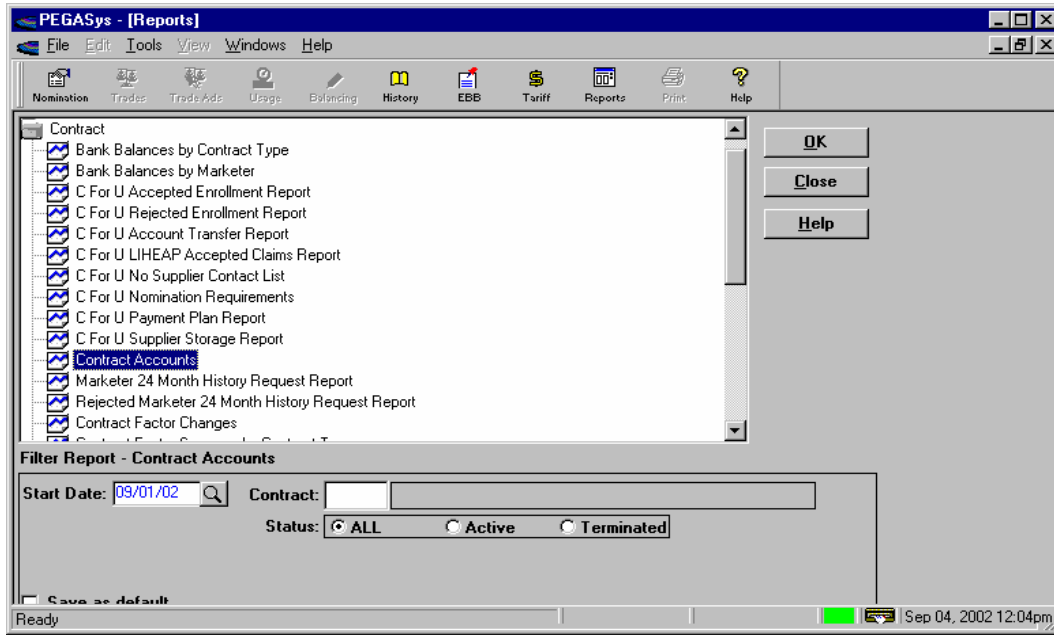


Click 'OK' and the C for U Account Transfer Report will be displayed.

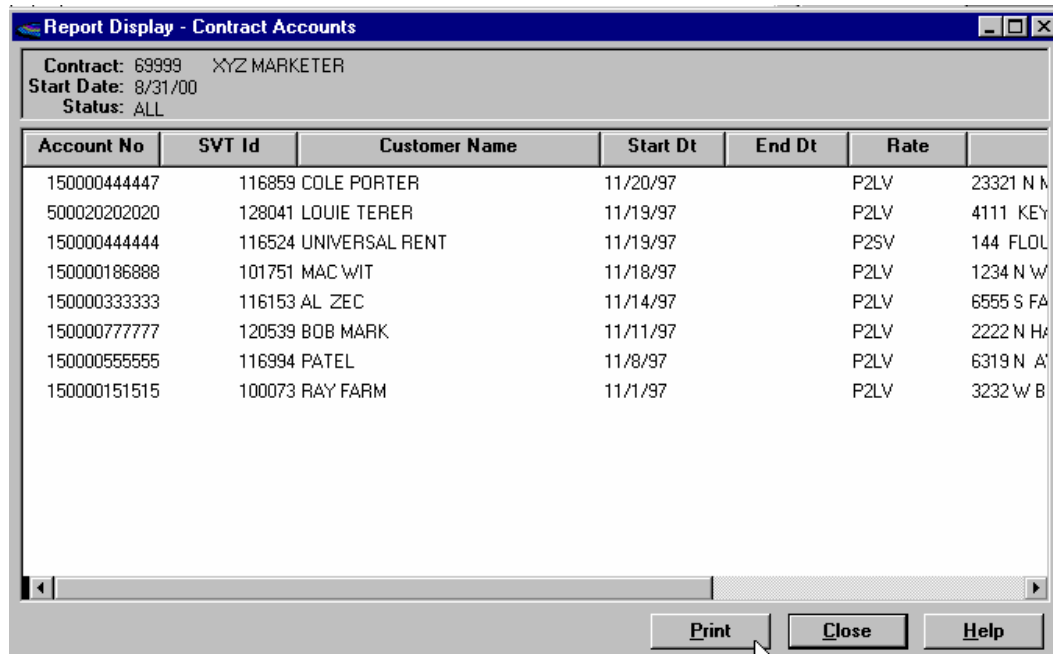


**Contract Accounts**

The Contract Accounts report lists all accounts that are either Active or were once active in the Pool. The Filter options for the report are displayed at the bottom of the panel. You can filter to receive 'ALL' accounts, only 'Active' accounts, or 'Terminated' accounts on a specific date ('Start Date'). You must enter a Contract (Pool) number.



Click 'OK' and the Contract Accounts report will be displayed.



The Start Date equals the date the account entered this pool. The End Date is only populated if an account has been terminated from this pool. The Rate indicates the customer's service classification. Periodically PGL/NSG may post messages on the Electronic Bulletin Board (EBB) for Choices For You<sup>sm</sup>

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Suppliers. To view these messages, choose the 'EBB' button on the Tool Bar. Any icons with a blue background will indicate that there is new information in that folder.

**Choices For You<sup>sm</sup> messages**

Messages related to the Choices For You<sup>sm</sup> program will be found in the Small Volume Trans. section of the EBB.

