



GRETCHEN WHITMER
GOVERNOR

STATE OF MICHIGAN
DEPARTMENT OF LICENSING AND REGULATORY AFFAIRS
LANSING

MARLON I. BROWN, DPA
DIRECTOR

Memorandum

DATE: 01/23/25

TO: Lisa Felice, Executive Secretary

FROM: Christina Forist, Compliance & Investigation Section, Manager
Jake Thelen, Compliance & Investigation, Specialist

SUBJECT: U-18120/U-20757 Reporting Requirements Consolidation for Investor-Owned Utilities

Investor-owned utilities are required to provide various reports to the Michigan Public Service Commission (Commission), specifically under Mich Admin Code, R 460.151 (Quarterly Reports) and Case No. [U-20757](#) (Utility Customer Payment Data).

Quarterly Reports are detailed in the Billing Rules and are submitted to the docket in Case No. [U-18120](#). This report includes account payment performance, the number and description of complaints registered with the utility, the number of shut off notices issued by the utility and the reasons for the notices, the number of hearings held by the utility, the number of written settlement agreements entered by the utility, the number of service disconnections, and the number of reconnections. Residential and small commercial customers are included.

Utility Customer Payment Data Report was ordered by the Commission in Case No. [U-20757](#) in recognition of the uncertainty with the duration and full impact of the pandemic. The Commission directed Staff to develop a revised template for data reporting, in consultation with the utilities and stakeholder groups, that will allow for a strategic tracking of the impacts of COVID-19, and the impacts of the changing economy on vulnerable households, and file the revised template in this docket.

February 10, 2022, in Case No. [U-20757](#), the Commission charged the Energy Affordability and Accessibility Collaborative, Data Analysis and Regulatory Review Subcommittee to examine a long-term data collection strategy that would be specific to shutoff, arrearage, restoration, demographic information, and energy burdens. The subcommittee worked with interested parties over several months in 2022, and offered several recommendations in the March 16, 2023, Staff Report in Case No. U20757,¹ to which the Commission responded in its December 21, 2023, Order.² On December 26,

¹ Case No. [U-20757-0524](#)

² Case No. [U-20757-0618](#)

2024, [U-20757](#)³ an interim progress report was filed based on compliance and recommendations the Commission directed in U-20757.

“Directive - Consolidation of Quarterly and Customer Payment Data Reports

In response to several Staff recommendations,⁴ resulting from the subcommittee’s work, the Commission directed actions regarding the consolidation of Quarterly and Utility Customer Payment Data Reports. These directives included the following:

- The Commission directed the combining of the Case No. U-20757 report and the Quarterly Report by December 2024, integrating the work of this recommendation with other approved in data submission recommendations.
- The Commission further directed Staff to work with utilities and other interested persons as appropriate to develop a new data reporting template and a timeline for its implementation to be completed by December 2024 and file the data reporting template in the docket of Case No. U-20757.

Action Steps – Updated Quarterly Report and Webpage Development

Staff has updated the quarterly report form,⁵ as outlined in Case No. U-20757.⁶ These changes reflect the approved recommendations that were vetted through the EAAC’s DARR Subcommittee combining both Case No. U-20757 Utility Customer Payment Data form and the existing Quarterly Report. **Utilities⁷ will start using this form starting in the first quarter of 2025. Monthly submission will no longer be required, but monthly data will be submitted quarterly. Utilities are still required to submit these reports to the webpage and docket in Case No. U-18120.** Staff has also been working on an updated webpage to make the new quarterly report data more transparent and easier to navigate. This webpage is currently in development and expected to go live in 2025.”

In summary, per Commission directive investor-owned utilities will be required to submit the new reporting template both electronically and to the Case No. U-18120 on a quarterly basis starting the first quarter of 2025.

³ Case No. [U-20757-0729](#), Pg. 2

⁴ Case No. [U-20757-0618](#), Pg. 21–25 & 28–29, Recommendation 2.1 to 2.5, 2.7

⁵ Appendix A: titled Merged Quarterly Report Template

⁶ Case No. [U-20757-0618](#), Pg. 21–25 & 28–29

⁷ Alpena Power Company, Consumers Energy Company, DTE Energy Company, Indiana Michigan Power Company, Michigan Gas Utilities Corporation, Northern States Power Company – Wisconsin (Xcel Energy), Semco Energy Gas Company, Upper Michigan Energy Resources Corporation, and Upper Peninsula Power Company

PROOF OF SERVICE

STATE OF MICHIGAN)

Case Nos. U-18120 & U-20757

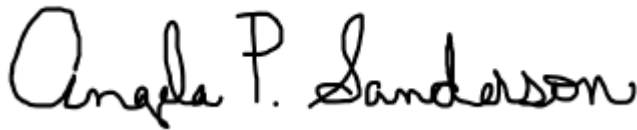
County of Ingham)

Lisa Felice being duly sworn, deposes and says that on January 23, 2025 A.D. she electronically notified the attached list of this **Memorandum via e-mail transmission**, to the persons as shown on the attached service list (Listserv Distribution List).



Lisa Felice

Subscribed and sworn to before me
This 23rd day of January 2025



Angela P. Sanderson
Notary Public, Shiawassee County, Michigan
As acting in Eaton County
My Commission Expires: May 21, 2030

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