

VERIFICATION

STATE OF NORTH CAROLINA)
)
COUNTY OF MECKLENBURG) SS:

The undersigned, Tara Bolen, Manager Products & Services, being duly sworn, deposes and says that she has personal knowledge of the matters set forth in the foregoing data requests, and that the answers contained therein are true and correct to the best of her knowledge, information and belief.

Tara Bolen
Tara Bolen, Affiant

Subscribed and sworn to before me by Tara Bolen on this 23rd day of August, 2024.

Sheila Lemoine
NOTARY PUBLIC
Sheila Lemoine

SHEILA LEMOINE
Notary Public, North Carolina
Lincoln County
My Commission Expires
July 21, 2029

My Commission Expires: July 21, 2029

KyPSC Case No. 2024-00114
TABLE OF CONTENTS

<u>DATA REQUEST</u>	<u>WITNESS</u>	<u>TA B NO.</u>
STAFF-DR-01-001	Tara Bolen	1
STAFF-DR-01-002	Tara Bolen	2
STAFF-DR-01-003	Tara Bolen	3

**Duke Energy Kentucky
Case No. 2024-00114
STAFF's First Set Data Requests
Date Received: August 8, 2024**

STAFF-DR-01-001

REQUEST:

Refer to Duke Kentucky's response to the Commission's June 24, 2024 Order in this proceeding, page 4, paragraph 10. Provide an updated STAFF-DR-03- 003(a) Attachment from Case No. 2022-00289¹ that accurately represents how the budget billing payment amount for 2023 was calculated.

RESPONSE:

Please see STAFF-DR-01-001 Attachment. Duke Energy performed the BBP review with the rate currently in effect at the time of the review.

PERSON RESPONSIBLE: Tara Bolen

¹ Case No. 2022-00289, *Elizabeth L. Eichelberger v. Duke Energy Kentucky, Inc.*

**Duke Energy Kentucky
Case No. 2024-00114
STAFF's First Set Data Requests
Date Received: August 8, 2024**

STAFF-DR-01-002

REQUEST:

Refer to Duke Kentucky's response to the Commission's June 24, 2024 Order in this proceeding, Confidential Attachment 1. Identify how many electric budget billing customers included in spreadsheet cell B5 are also included in cell B6.

RESPONSE:

In the Company's response to the Commission's June 24, 2024, Order, Confidential Attachment 1, all of the 4,907 customers included in cell B6 were included in the count of 7,767 in cell B5. In other words, all active accounts receiving electric annual budget billing on or after December 1, 2022, for which billing was subsequently changed prior to the next yearly settle-up without customer request have also had billing calculated using a divisor of 12.

PERSON RESPONSIBLE: Tara Bolen

Duke Energy Kentucky
Case No. 2024-00114
STAFF's First Set Data Requests
Date Received: August 8, 2024

PUBLIC STAFF-DR-01-003
(As to Attachment only)

REQUEST:

Refer to Duke Kentucky's response to the Commission's June 24, 2024 Order in this proceeding, page 3, paragraphs 3-4.

- a. Confirm that Duke Kentucky has not filed a new tariff updating the Electric Annual Budget Billing Plan since a final Order was issued in Case No. 2022- 00372.¹
- b. State whether Electric Annual Budget Billing customers are still being billed based on the language in Duke's Gas Budget Billing Tariff.²
- c. If Electric Annual Budget Billing customers are still being billed based on the language in Duke's Gas Budget Billing Tariff, provide an updated version of Duke Kentucky's Response to the Commission's June 24, 2024 Order in this proceeding, Confidential Attachment 1, using the effective date set forth in the updated Electric Annual Budget Billing tariff to be filed by Duke Kentucky. Consider this request ongoing until such time a final Order is issued in this matter.

RESPONSE:

CONFIDENTIAL PROPRIETARY TRADE SECRET (As to Attachment only)

- a. Duke Energy Kentucky has finalized tariff updates to be filed for both Electric and Gas Budget Billing tariffs and has submitted a newspaper announcement for

¹ Case No. 2022-00372, *The Electronic Application of Duke Energy Kentucky, Inc., for: 1) An Adjustment of the Electric Rates; 2) Approval of New Tariffs; 3) Approval of Accounting Practices to Establish Regulatory Assets and Liabilities; and 4) All Other Required Approvals and Relief* (Ky. PSC July 1, 2024), final Order.

² Ky. P.S.C. Gas No. 2, Seventh Revised Sheet No. 25 (issued Oct. 27, 2023), effective Oct. 13, 2023.

printing to applicable newspapers. The Company will file its tariff filing as soon as sufficient publications of the notice have been completed pursuant to 807 KAR 5:011, Section 8. In the process of responding to further discovery in Case No. 2022-00289, reviewing the Commission's order in Case No. 2022-00289, and in responding to the Commission's initial Order in this proceeding, the Company had further opportunity to review and consider the revisions to be made to its tariffs prior to finalizing the proposed language. The Company believes that the finalized language will provide an optimal experience for customers and also comply with the Commission's guidance.

- b. Electric Annual Budget Billing customer plan amounts are still being calculated using a divisor of 12 consistent with language in Duke's Gas Budget Billing Tariff. Since October 1, 2023, the Company has stopped adjusting both Electric and Gas Annual Budget Billing customer plan amounts on a quarterly basis according to thresholds. This was done due to customer confusion and dissatisfaction with the more frequent adjustments. The Company has not since reestablished new thresholds in the Annual Budget Billing plans.
- c. The Company has reviewed its currently active budget billing customers and prepared the lists of customers requested by the Commission, which is attached as STAFF-DR-01-003(c) Confidential Attachment. A single customer may appear on more than one of the three lists. The total number of customers in each category is as follows:
 - 637 customers - all active accounts receiving gas annual budget billing that had settle-ups calculated before January 4, 2022, for which billing

was subsequently changed prior to the next yearly settle-up without customer request;

- 0 customers - all active accounts receiving gas annual budget billing on or after December 1, 2022, for which billing was calculated based on anything other than customer's usage multiplied by the rate in effect at the time of settle-up. This data remains unchanged from Duke Energy Kentucky's Response to the Commission's June 24, 2024 Order;
- 3,509 customers - all active accounts receiving electric annual budget billing on or after December 1, 2022, for which billing was subsequently changed prior to the next yearly settle-up without customer request;
- 0 customers - all active accounts receiving electric annual budget billing on or after April 1, 2022, for which billing was calculated based on anything other than customer's usage multiplied by the rate in effect at the time of settle-up. This data remains unchanged from Duke Kentucky's Response to the Commission's June 24, 2024 Order; and
- 7,123 customers – all active accounts receiving electric annual budget billing on or after December 1, 2021, for which billing was calculated using a divisor of 12.

PERSON RESPONSIBLE: Tara Bolen

**CONFIDENTIAL PROPRIETARY TRADE
SECRET**

**STAFF-DR-01-003(c)
CONFIDENTIAL ATTACHMENT**

FILED UNDER SEAL