

## Proposed Report Outline

1. Description of existing income-qualified low-income electric, water and gas utility customer assistance programs and application enrollment systems
  - CPUC Energy & Water Programs
  - Other State Energy and Water Programs
  - Other State Programs with same income qualifications (high level)
  - Description of models of working concurrent application enrollment between these three program categories
  
2. Description of Universal Lifeline Telephone Service Program
  - Eligibility and assistance offerings
  - General Administration
    - i. Roles and Responsibilities of the third-party administrator contract
    - ii. Roles and Responsibilities of service providers
  - Existing application enrollment system(s)
  - Existing linkages/program coordination with CPUC Energy and Water Programs and other programs
  
3. Universal Application System Working Group
  - Brief Background on UAS Working Group
  - UAS Working Group Objectives
  - UAS Working Group Recommendation Report w/ emphasis on recommendations and strategies directly aligning with SB 1208 objectives and those informing a potential roadmap for using new technologies in the future to: 1) to streamline customer enrollment and post-enrollment verification in CPUC energy and water assistance programs; 2) facilitate enrollment opportunities of assistance programs administered by the state and public and private utilities; and 3) maximize data sharing to promote greater public awareness of and participation in target programs.
  
4. Opportunities and challenges to expand the third-party administrator contract for the Universal Lifeline Telephone Service Program to encourage stronger program coordination between CPUC water, gas, electric, and telephone customer assistance programs and the development/implementation of innovative intake strategies and systems to streamline customer application, enrollment, and post-enrollment verification in these programs.
  
5. Near or Short-term Strategies
  - Recommendations to amend/modify the existing third-party administrator contract
  - Recommendations to immediately strengthen program coordination and administration between CPUC water, gas, electric and telephone customer assistance programs
  - Leverage the UAS Working Group recommendations to inform the development of a technology and data sharing roadmap to inform the implementation of a concurrent-application system for CPUC Energy, Water, and Telephone customer assistance programs

and viable data sharing strategies having the potential to expedite eligibility verification processes. Viable data sharing strategies shall place immediate focus on implementing a workable data sharing model for specific use within CPUC Energy, Water, and Telephone customer assistance programs first, and then a second data sharing strategy focused on partners and resources external to the CPUC and regulated utilities.

- Identify potential barriers or challenges to data sharing between Health and Human Services Programs that verify income eligibility by household and CPUC Energy (IOUs), Water and telephone customer assistance programs and what would be needed to solve these barriers to enable a concurrent application system across CPUC and HHS low-income programs.
- Recommendations to address language or access barriers with existing and concurrent application processes.

#### 6. Long-term Strategies

- Pursue new third-party administrator contract to achieve deeper program coordination and administration ties across all CPUC water, gas, electric, and telephone customer assistance programs
- Implement single and/or concurrent application system for CPUC energy, water, and telephone customer assistance program
- Implement data sharing strategies identified in the roadmap
- Potential to build an implementation plan to enable a single and/or concurrent application system across CPUC and HHS low-income programs