

Verification Call Script – Natural Gas and Electricity

Note: In this script, the term “supplier” is used to refer to the gas marketer / electricity retailer.

Outbound Introduction

1. **Option A** – If the supplier considers it necessary for the purpose of ensuring compliance with the CRTC’s telemarketing rules:

“Good [morning / afternoon / evening], my name is [verification representative’s name] from [name of third party telemarketer]. I am calling you on behalf of [supplier name]”.

Option B – If the supplier does not consider Option A to be necessary for the purpose of ensuring compliance with the CRTC’s telemarketing rules:

“Good [morning/ afternoon / evening], my name is [verification representative’s name] and I am calling on behalf of [supplier name]”.

2. “May I please speak with [account holder name]”? Y/N

If yes – “May I please confirm that you are the natural gas and electricity account holder”? Y/N

If no - “Are you the spouse of the account holder”? Y/N

If no – “Is there an individual with specific authorization from the account holder who is able to make decisions in regards to the natural gas and electricity supply for this [residence / business]”? Y/N

If no, the verification representative may ask the consumer if there is a more convenient time to call, but otherwise the call must be terminated.

Inbound Introduction

1. “Thank you for calling [supplier name], my name is [verification representative’s name]. Can I please confirm that you are calling to verify that you would like to proceed with a contract with [supplier name] for the provision of your natural gas and electricity”? Y/N

If no, the verification representative may either end the call or transfer the call to the correct department at the supplier to deal with the consumer’s enquiry.

2. “May I please confirm that you are the natural gas and electricity account holder”? Y/N

If no - “Are you the spouse of the account holder”? Y/N

If no – “Are you specifically authorized by the account holder to make decisions in regards to the natural gas and electricity supply for this [residence / business]”? Y/N

If no, the verification representative shall indicate to the consumer that the verification process cannot proceed because the consumer does not appear to have the authority to verify the contract, and the call must then be terminated.

All calls

3. “Are you comfortable for this call to proceed in English”? Y/N

If no – “Is there someone present that speaks English and can assist you with this call”? Y/N

If no – “Is there a more convenient time when we can call back when there will be someone that speaks English and can assist you with this call”? Y/N

If yes, the verification representative can confirm the arranged time and end the call thanking the consumer for their time.

If no, the call must be terminated. The call must also be terminated if the verification representative knows or ought to know that the consumer is not reasonably able to protect his or her interests by reason of inability to understand English. In this case, before terminating the call the verification representative must explain to the consumer the reason for not proceeding with the verification process.

4. “Just to let you know, this call is being recorded for regulatory and quality control purposes. Are you comfortable with this call being recorded”? Y/N

If no, the verification representative shall explain to the consumer why the verification process cannot proceed. The verification representative may ask the consumer if there is a more convenient time to call again, but otherwise the call must then be terminated.

5. “Today’s date is [date]”.

6. "The purpose of this call is to verify that you would like to continue with a contract / contracts with [supplier name] for the provision of your natural gas and electricity, and to go over certain key terms of the contract / contracts you signed on [date]".
7. "We are allowed to contact you to verify this contract / these contracts between 10 and 45 days after you received a written copy of the contract / contracts that you signed".
8. "Please note that you are under no obligation to verify this contract / these contracts. Do you understand that if you choose not to verify this contract / these contracts you will not have to pay any cancellation fees and that the supply of your natural gas and electricity will not be interrupted"? Y/N
9. "Our records state that you received and signed a written copy of the contact / written copies of the contracts on [date]. The contract details for natural gas are a term of [x] years at a price of [price details]. The contract details for electricity are a term of [x] years at a price of [price details]. Can you please confirm that this is correct"? Y/N

If based on the date of receipt of the contract(s), verification is occurring outside of the 10-45 day window, the verification representative must explain to the consumer why the verification process cannot proceed, and the call must then be terminated.

10. "[Supplier name] is required to provide you with disclosure statements and price comparison documents that contain important information about natural gas and electricity contracts. Did you receive and sign a copy of the disclosure statements and the price comparison documents"? Y/N

If the consumer does not recall whether they received and signed the documents, the verification representative may offer to send a copy of the signed documents to the consumer by email or other means of delivery. The verification representative may also ask the consumer if there is a convenient time to call again once the copies of the documents have been received by the consumer, but otherwise the call must then be terminated.

If the consumer indicates that they did not receive and sign the documents, the verification representative must explain to the consumer why the verification process cannot proceed, and the call must then be terminated.

11. "Do you understand that if you verify this contract / these contracts, [supplier name] will become your natural gas and electricity supplier"? Y/N

12. “Do you understand that [supplier name] is not your utility, and is not associated with the Ontario Energy Board or the Government of Ontario”?
Y/N

If no, the verification representative must explain the independence of the supplier.

13. “Please note that if you cancel this contract / these contracts after you have verified the contract / these contracts today, you may have to pay a cancellation fee”.

14. “You should also be aware that energy cost savings under this contract / these contracts are not guaranteed”.

15. “Do you agree to verify this contract / these contracts and proceed with the purchase of natural gas under the contract for a term of [x] years at a price of [price details] and electricity for a term of [x] years at a price of [price details]”? Y/N

No - consumer wants more time - If the consumer states that they do not wish to verify the natural gas / electricity contract(s) today as they need more time to make a decision as to whether or not to proceed with the contract(s), the verification representative may ask if there is a convenient time when the verification representative may call back but otherwise the call must be terminated. Where there is one contract for natural gas and another for electricity and the consumer wishes to defer a decision on one contract only but continue with the call for the other, the verification representative may continue with the call in respect of the contract for which the consumer is willing to proceed.

No – consumer does not want to verify the contract(s) - If the consumer states that they do not wish to verify the natural gas / electricity contract(s), the verification representative may thank the consumer for their time but otherwise the call must be terminated and the verification representative must inform the supplier of the consumer’s choice not to verify the contract(s). Where there is one contract for natural gas and another for electricity and the consumer states that they do not wish to verify one of the contracts but they wish to proceed with the other, the verification representative may continue the call in respect of the contract for which the consumer is willing to proceed, and must inform the supplier of the consumer’s choice not to verify the other contract.

16. Read if a green energy or other available contract option was selected by the consumer – “Also, you have selected [option and price details] for a total

contract price of [price details]. Is this correct"? Y/N (Repeat for both natural gas and electricity if applicable).

If the consumer states that they no longer wish to have the additional option(s), the verification representative must then confirm that the consumer is only verifying the contract and price details in 15 above.

17. "For your electricity contract only, if you change your mind, you may notify [supplier name] that you want to cancel the electricity contract at any time up to 30 days after you receive your first bill under the contract. You will have to pay that bill, but you will not have to pay any cancellation fees or penalties. You will then receive your electricity supply from your utility with no interruption in service".

18. "May I please confirm that I have the correct spelling of your name [consumer name]"? Y/N

If no, ensure the correct spelling is recorded.

19. "May I please confirm that I have the correct spelling of your address [consumer address]"? Y/N

If no, ensure the correct spelling is recorded.

20. "I would also like to confirm that your natural gas account number is [account number]. Is this correct"? Y/N "And your electricity account number is [account number]. Is this correct"? Y/N

If no, ensure correct account number(s) are recorded.

21. "For our records, can you please confirm that the best telephone number to reach you is [consumer telephone number]"?

If no, ensure the correct telephone number is recorded.

22. "You are entitled to request a copy of this call recording today or on a later date. If you ask for a copy of this call recording, we must send it to you within 10 days of your request".

If the consumer requests a copy of the call recording during the call, the verification representative must inform the supplier of the request.

23. "You can also obtain further information about energy contracts, energy prices and your rights and obligations as an energy consumer from the Ontario Energy Board. Would you like the Ontario Energy Board's website address or toll-free number"? Y/N

If yes, provide the Board's contact details.

24. "Thank you for your time. You should notice the [supplier name] name and our toll free number appear on your natural gas bill in [x] days and on your electricity bill in [x] days. If you have questions or you wish to request a copy of the recording of this call, please contact us at the contact information provided on your contract. Alternatively you can call us at our toll free number which is [number]"