



## REVIEW COMMITTEE

**IBEW**



PACIFIC GAS AND ELECTRIC COMPANY  
LABOR RELATIONS DEPARTMENT  
375 N. WIGET LANE, SUITE 130  
WALNUT CREEK, CA 94598  
(530) 246-6430

INTERNATIONAL BROTHERHOOD OF  
ELECTRICAL WORKERS, AFL-CIO  
LOCAL UNION 1245, I.B.E.W.  
P.O. BOX 2547  
VACAVILLE, CALIFORNIA 94696  
(707) 452-2700

ROBIN WIX, CHAIRMAN

- ☐ DECISION
- ☐ LETTER DECISION
- ☐ PRE-REVIEW REFERRAL

KIT STICE, SECRETARY

### **Pre-Review Committee Number 22895 Customer Care – Customer Service Office – West Sacramento**

Joe Brennan  
Company Member  
Local Investigating Committee

Bryan Carroll  
Union Member  
Local Investigating Committee

#### Subject of the Grievance

This case concerns the termination of a Customer Service Representative for violating the Employee Code of Conduct by using her knowledge of PG&E's collections processes to avoid paying outstanding debts; and violated the CSO Employee Conduct Summary by accessing her personal account 21 times, and a family member's account on 2 occasions without a valid business reason to do so.

#### Facts of the Case

The grievant was a Local Office Customer Service Representative with 15 years of service and no active discipline at the time of her termination.

The Company was made aware that the grievant had past PG&E accounts which were identified as having outstanding balances owed which the grievant had not transferred to her newly opened account(s) over several years, nor had she paid the debt. The report identified that the grievant had a closed account from February 2008 with an unpaid balance of \$777.83 which was transferred to another account that was closed in August 2008 with an unpaid balance of \$1,031.82.

In 2010 the grievant's husband opened an account where he and the grievant resided together. This account had five payments made by bank checks with insufficient funds. In 2012 the grievant opened a new account at the same address where her husband had opened the account in 2010. The balance owing on the original account at the time was \$371.81. When opening the new account, rather than provide her Social Security number, the grievant provided her Driver's License number and used her maiden name instead of her married name as documented on her driver's license which would have directly linked her to prior accounts with unpaid balances for which she was responsible. By opening a new account in this manner, the grievant avoided having the \$371.81 balance transferred to her new account.

During the investigation it was also discovered that the grievant viewed her personal account on 21 separate occasions without a business reason in violation of the Conduct Summary Supplement, including after she received a Shut-Off-Non-Pay (SONP) notification and after the account had been closed with an outstanding balance. After viewing the closed account, the grievant was aware of the outstanding balance and took no action to transfer the balance to her current account or pay the outstanding amount. The grievant also accessed her mother's account on 2 occasions without a business reason in violation of the Customer Service Office Conduct Summary. Additionally, the grievant had her PG&E employee discount on her daughter's residence, where the grievant did not reside, for over eight months in violation of the employee discount policy.

#### Discussion

The Union argued that the grievant was a good customer service representative with 15 years of dedicated service to the Company. The grievant was not using her knowledge of PG&E customer account processes to avoid paying debt she owed, rather she was unorganized and trusted her spouse to pay the bills. Furthermore, the grievant never took direct action to alter or manipulate those accounts for personal gain and only viewed them to determine the status of the accounts. The Union argued that the grievant's excellent work history should have been taken into consideration by the Company and a lesser penalty than termination should have been issued.

The Company argued the grievant purposely avoided having outstanding debt transferred to her current PG&E account(s) and did so through the use of her knowledge as a customer service representative. She obviously avoided notifying the company of balances owed on prior accounts, as demonstrated by her opening a new account in her maiden name at an address where she had resided for several years, and for which there was yet another outstanding balance owed. The grievant claimed that she wasn't aware of any outstanding debt as her husband paid the bills, however the Company would call into question her honesty and trustworthiness as she viewed the account after it had been closed and she took no action to pay the bill or notify the Company to transfer the outstanding balance to her current account. In all, through her knowledge of internal PG&E processes for customer accounts, the grievant avoided paying \$1540 from six delinquent/closed accounts.

The Company further argued that the grievant demonstrated she could not be trusted to follow policies and procedures since she acknowledged she was fully trained and aware of the CSO Conduct Summary policy prohibiting her from accessing her personal account and family member's accounts. Additionally, she violated yet another policy when she applied her PG&E discount to her daughter's residence. By her actions, the grievant demonstrated her lack of integrity and honesty and therefore cannot be trusted to have access to PG&E's customers' accounts. Termination of the grievant was for just cause.

#### Decision

The Committee agreed the termination was for just cause. This case is closed.

  
Robin Wix, Chairman  
Date 4-13-16

  
Kit Stice, Secretary  
Date 4-13-16  
Review Committee