

## Admin Help Guide – Create a Change Service Work Order

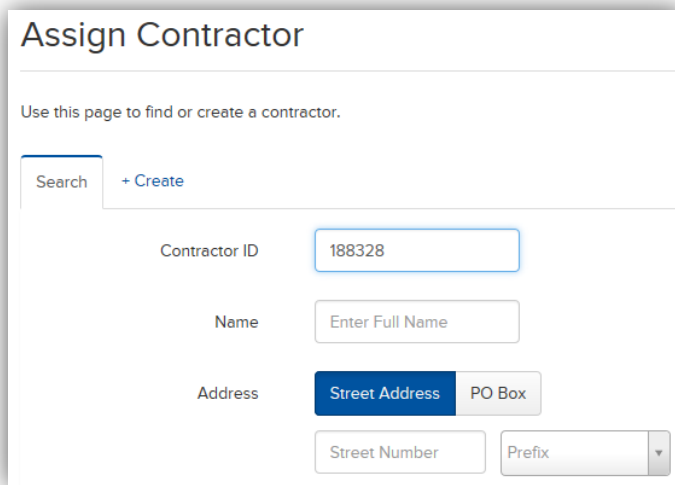
This document provides step-by-step instructions for creating a work order on PPL Electric Utilities' Contractor Services tool.

Create a work order in 6 easy steps: Assign Contractor, Work Category, Service Address, Contact Information, Additional Information, Review and Submit.

Get started by clicking the green **Start New Work Order** button.

### Assign Contractor

1. If the caller already has a contractor ID, use the **Search** tab to locate the contractor.

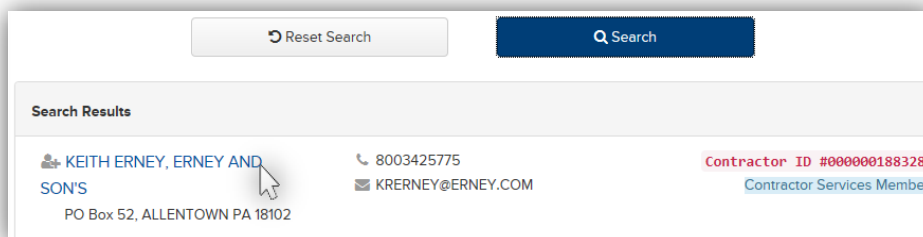


The screenshot shows the 'Assign Contractor' form. At the top, it says 'Use this page to find or create a contractor.' Below this are two tabs: 'Search' (selected) and '+ Create'. The form has several input fields: 'Contractor ID' with the value '188328', 'Name' with the placeholder 'Enter Full Name', and 'Address' with a dropdown menu set to 'Street Address'. Below the address dropdown are fields for 'Street Number' and 'Prefix'.

**Notes:**

- ✓ Once you have selected a contractor, you can edit the contractor's information, if necessary, and click **Update**.
- ✓ If the selected contractor is a Contractor Services Member (shown under the Contractor ID in the image below), you will not be able to edit any information associated with their online profile.

Select the contractor by clicking anywhere on that row.



The screenshot shows the search results for a contractor. At the top are 'Reset Search' and 'Search' buttons. Below is a 'Search Results' section with one entry for 'KEITH ERNEY, ERNEY AND SON'S'. The entry includes a phone icon with the number '8003425775', an email icon with 'KRERNEY@ERNEY.COM', and a location 'PO Box 52, ALLENTOWN PA 18102'. On the right side of the entry, it says 'Contractor ID #00000188328' and 'Contractor Services Member'.

- If the caller does not have a contractor ID, select the **+ Create** tab, enter all required information and click **Create**.

- Notes:
- ✓ The new contractor ID will be displayed at the top of the page. You can provide this number to the caller.
  - ✓ This will create a contractor ID in WAM but will NOT register the caller for the Contractor Services tool.

- Click **Continue** to move to the **Work Category** step.



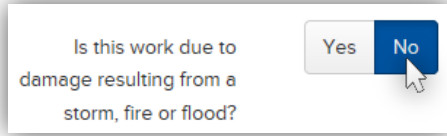
## Work Category

- Select the type of work you would like to have performed. For example, you could select Residential Change > Overhead > Load Increase for work at an existing residential property.

- Notes:
- ✓ Only requests for single phase work can be created with this tool.
  - ✓ The Fast Track option will only appear if the contractor selected is a qualified Fast Track Electrician.

- Select the **Existing Service Amp Size** and **New Amp Size After Upgrade**.

3. Answer the question regarding damage from a **storm, fire or flood**.

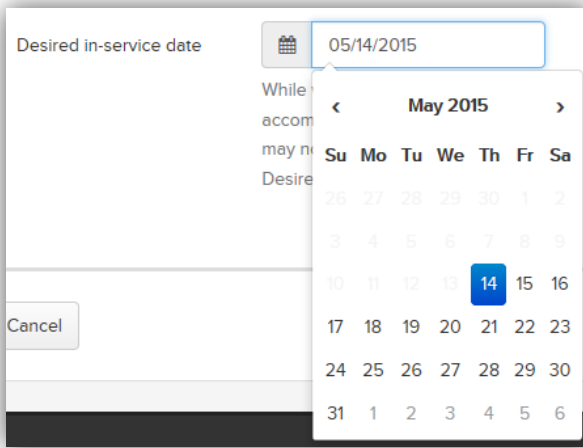


Is this work due to damage resulting from a storm, fire or flood?

Yes No

- Notes:
- ✓ If you select **Yes**, please ask your normal probing questions.
  - ✓ Failure to select the most accurate answer may result in significant delays to the work order.

4. On the **Desired In-service Date** calendar, select the date that the caller wishes to have the work completed. A minimum of 21 days is required.



Desired in-service date

05/14/2015

While accom may n Desire

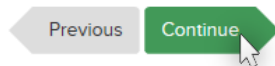
May 2015

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Cancel

- Notes:
- ✓ Enter the actual date that the caller requests. Do not enter a date 90 days in the future unless the caller specifically requests that date.
  - ✓ A 90-day date will be automatically entered on the work order in WAM unless the caller specifies a date further into the future.

5. Click **Continue** to move to the **Service Address** step.



Previous Continue

## Service Address

1. **Search** for the location where the work will be performed. Numerous search options are available, including bill account number and meter number. Additional search fields are available by clicking **Advanced**. Select the correct service address in the search results.

Service Address Search

Help us locate where you are doing your work.

Search Type:

Bill Account Number:

Ratepayer's Last Name \*:

Meter Number:

Phone Number:

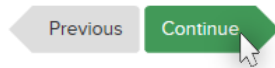
Search Results

<input checked="" type="button" value="Select"/>	876 E MAIN ST APT 2B BLOOMSBURG PA 17815	1234567890
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### Notes:

- ✓ Service addresses come in many different formats. If you're having trouble finding an address, try searching by bill account or meter number.
- ✓ The bill account number is displayed to the right of the service address.

2. Click **Continue** to move to the Contact Information step.



## Contact Information

1. Add a **Primary** contact, **Responsible Party** and **Additional** contacts, if necessary.

Primary Contact \*

Full Name \*:

Address \*:

Extra Information ( 30 character max )

Phone Number \*:

Email:

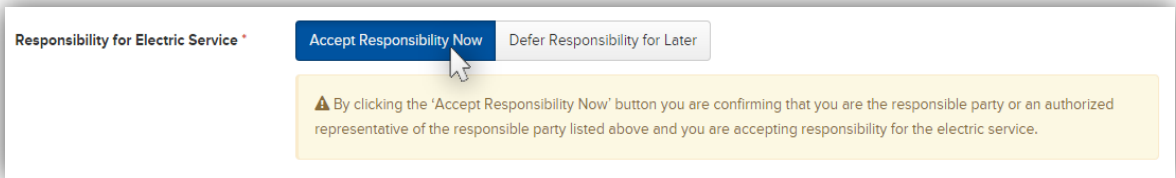
### Notes:

- ✓ Primary and Responsible Party contacts are required.
- ✓ Use the **Set as Primary** or **Set as Responsible Party** buttons to quickly fill in information.

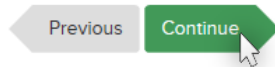
2. If the address selected already has active electric service, the Responsible Party will be pre-filled.
3. Select the appropriate button in the **Responsible Party** section, when applicable. If the address selected already has active electric service or if the RP is the same as the initiator, these buttons will not be displayed and the RPC and RPL holds will not be placed on the work order.

**Defer Responsibility for Later:** Select this option if the caller/initiator is not the responsible party and they are not authorized to accept responsibility for the electric service on behalf of the responsible party listed. Before work can proceed, the responsible party must accept responsibility for the electric service. A letter will be mailed with instructions.

**Accept Responsibility Now:** Select this option if the caller/initiator is authorized to accept responsibility for the electric service on behalf of the person or entity listed as the responsible party.



4. Click **Continue** to move to the **Additional Information** step.



## Additional Information

1. Enter as much information as you have before submitting your request for work. Some information is required.

**Additional Information**

The information entered here will help us design and schedule work more quickly. (Some fields are required, some are optional, and some are not available (some fields are required)).

**What changes are being made?  
(Select All That Apply) \***

- Meter Base Replacement
- Change Meter Location
- Changing from Fuses to Breakers
- Weatherhead Replacement
- Main Breaker Replacement

**Required Information:**

- ✓ What changes are being made?
- ✓ Are you adding electric load?
- ✓ Is a temporary disconnect required?  
(5 business day notice required)

2. In the **Comments** section, select the type of comment you need and enter any additional information for the request. An automated comment will be placed on the work order documenting who you spoke with and the details of the work order. Only enter additional information.

**Comment Type**

**CCC** Crew Instructions

**Comments**

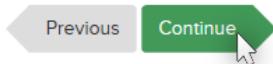
Is there any more information you would like us to know about this work order?

360 character limit

**Required Information:**

- ✓ Only one comment can be entered prior to submission. Additional comments can be entered after creating the work order.
- ✓ Crew Instructions comments are used to relay specific information to the crew doing the work.

3. Click **Continue** to move to the **Review and Submit** step.



## Review and Submit

1. Review the request to ensure all information is accurate.
2. If necessary, edit information by clicking the **Edit** button next to the information you need to change.

### Review & Submit

Please review the information entered before finalizing and submitting your request.

#### Work Category Information ✔Complete

Discipline Description	<b>Residential Change - Overhead - Load Increase</b>
Existing Service Amp Size	<b>100A</b>
New Amp Size After Upgrade	<b>200A</b>
Desired in-Service Date	<b>09/08/2015</b>

[Edit Work Category](#)

#### Service Information ✔Complete

Street Address	<b>138 MAIN ST BETHLEHEM, PA 18017</b>
Extra Information	
Meter Number	<b>12345678</b>
Bill Account Number	<b>0987654321</b>

[Edit Service Address](#)

3. When finished, click the **Submit Work Order** button to submit the request and create a work order.

By clicking **Submit Request** you are agreeing that you have reviewed the information above and it is correct to the best of your knowledge.

[Submit Work Order](#)

#### Notes:

- ✔ The work order number will be displayed on the next screen.
- ✔ If the caller is a Contractor Services Member, they will receive an email containing their work order number.