EDEWG Meeting 6/2/2011

**Utilities:** West Penn Power, Duquesne Light, PECO, First Energy (MetEd, Penelec, Penn Power), PPL Electric Utilities, and UGI Utilities

**Suppliers/Service Providers**: Ista North America, Constellation New Energy, Energy Plus, UGI Energy Services, Brighten Energy, Energy Services Group, PPL Solutions, EC InfoSystems, GDF Suez, Exelon Energy, BlueStar Energy, Dominion Retail, First Energy Solutions, Direct Energy, Direct Energy Business, and BusinessMODERN

**Other**: PUC

**Agenda:**

1. Introductions & Roll Call
2. Approve May Meeting Minutes
3. CHARGE/PUC Secretarial Letter – Unit Pricing / PA Sales Tax
4. EDI Change Control

CC #079 – EGS Tax Calculation Requirements to PA Notes in 810LDC

CC #085 – 814E/814C/814R/867HU/867HIU – Special Meter Configuration Segment

CC #087 – 867HU/867HIU – Effective date of PLC/NSPL

1. Net metering / Cogeneration in 867MU & 867IU
2. NSPL/PLC update process
3. Meter Data Access/Smart Meter PA – Sub-group update
4. New Business
5. Next Meeting

**Meeting Notes:**

## Introductions & Roll Call

Brandon Siegel (Ista, Secretary & EDI Change Control Manager) commenced roll call. Matt Sigg (Constellation New Energy, Supplier Co-Chair) facilitated the meeting. Other EDEWG leadership present: Sue Scheetz (PPLEU, Utility Co-chair)

## Approve Meeting Minutes

## Susan Miller (UGI Utilities) asked Item C under new business be updated to reflect a June timeframe to begin EDI testing for CPG with a tentative go-live of late July / early August pending PUC tariff approval. This has been incorporated into the May meeting minutes. New filename is M20110512\_Update.docx

## PUC Secretarial Letter – Unit Pricing and Sales Tax on Customer Bills

On May 27th, 2011 the PUC issued a secretarial letter as a reminder to EGSs of their responsibilities under Commission’s regulations.

Failure to place unit price on customer bills. Some EGSs may not be sending the price / rate in the charge description of the SAC15 element within the bill ready EDI 810 invoice. EDEWG discussion led to the actual text sent in the SAC15. It was asked if an EGS could use the word ‘ENERGY’ instead of ‘GENERATION’ or ‘GENERATION AND TRANMISSION’. Brandon Siegel stated the intent of the secretarial letter is focused on the unit price being in the charge description, not the exact use of a word. Furthermore, Brandon stated there are SAC15 length limitations imposed by WPP (35 characters), PPLEU (47 characters) and PECO (55 characters) which cut off the description on the customer bill leading to even more customer confusion. Therefore using shortened wording such as ‘ENERGY’ or ‘ENERGY CHARGE’ is used in production, no EDC stated this was an issue. EDEWG leadership stressed the importance of sending the unit price in the SAC15 and urges compliance with the PUC letter.

Sales Tax incorrectly charged to residential customers. There have been cases where EGSs are including PA State Sales Tax on residential customer invoices. The Commission asks EGSs to be aware of the issue and make sure they correctly apply State Sales tax according to PA Dept of Revenue rules.

The Commission requests each EGS in PA email OCMO by 6/10/2011 with their status pertaining to these two matters.

## EDI Change Control

## EDI Change Control #079 – Add EGS Tax Calc Rqmts to PA Notes in 810LDC

EDI Change Control #079 adds EGS tax calculation requirements to the PA Notes section for the 810LDC transaction set. Upon EDEWG request, each rate ready EDC reported their process regarding a re-bill invoice where a change was made in the tax rate and in the event a change occurred in the EGS tax exemption percentage. The bill ready statement regarding the Est. PA State Tax (aka MST) remains pending CHARGE determination of EGS applicability. EDI CC 79 remains open.

## EDI Change Control #085 – add Spec Meter Config to 814E/C/R & 867HU/HIU

As a result of CHARGE & EDEWG discussions as well as PPLEU internal efforts, Sue Scheetz (PPLEU) put forth EDI Change Control #085. This change adds a new Special Meter Configuration segment to the 814 Enrollment/Change/Reinstatement and 867 Historical Usage/Historical Interval Usage transactions. The change also adds net metering quantity qualifiers in the 867 HU/HIU transaction sets. This new REFKY special meter configuration segment will report Net Metering/Co-Generation presence and permit future use for support of special meter configurations such as Electric Vehicles. Brandon Siegel reported EDEWG leadership met on 4/25 and agreed all EDC’s would be required to implement CC #085. PPLEU has provided their initial list of applicable REF02 codes.

EDEWG discussed this change in detail, each EDC’s response as follows…

WPP: under a code freeze due the FE merger, likely needs to be addressed under FE’s system.

FE: currently a manual process to identify these accounts. FE’s legal dept reviewing.

DLC: currently system unable to identify, customer generation accounts are manually supported.

UGI: Same as DLC, unable to identify, manually supported.

PPLEU: currently a manual process, moving to automated support to eliminate manual efforts.

PECO: will not support EDI CC85 without cost recovery.

Due to PECO’s non-support and other EDC’s manual processes, EDEWG is unable to reach consensus on EDI Change Control 85. The EDI Change Control manager will update the EDI change control with the discussion and escalate CC 85 to PUC staff.

## EDI Change Control #087 – Effective Date of PLC/NSPL in 867HU/HIU

BlueStar Energy put forth EDI Change Control #087 which adds an effective date for the PLC and NSPL values in the EDI 867HU and HIU transaction sets. Brandon Siegel briefed EDEWG on the details of the change control which was adopted from the current segment in the Illinois 867 EDI Implementation Guideline. Constellation New Energy commented stating the need is driven by the values and most EDC systems only send the current value in the Historical Usage transaction. By implementing this change, the EDC’s will provide both the current and future PLC values with their effective dates. BlueStar Energy agreed with Constellation’s comments adding they request the change be implemented by the end of 2011 which would support the 2012 values. Brandon Siegel stated the PLC value is more important than the NSPL; suppliers agreed.

EDEWG discussed this change in detail, each EDC’s response as follows…

WPP: under a code freeze due the FE merger, likely needs to be addressed under FE’s system.

FE: supports CC87, investigating feasibility of implementing.

DLC: does not object, investigating internally.

UGI: does not object, investigating internally.

PPLEU: stated CC87 is a good idea, investigating internally.

PECO: will not support EDI CC87 without cost recovery.

Due to PECO’s non-support, EDEWG is unable to reach consensus on EDI Change Control 87. The EDI Change Control manager will update the EDI Change Control 87 with the discussion and escalate to PUC staff.

## Net Metering in the 867MU and 867IU

EDI Change Control #085 adds a REF segment to the 814E/C/R and 867HU/HIU transactions sets. CC85 also adds net metering quantity indicators to the 867HU/HIU transaction sets. Unfortunately, EDEWG was unable to reach consensus on EDI CC 85 as stated above.

WPP, PPLEU, PECO, First Energy, DLCO, and UGI have provided sample EDI transactions for reporting customer co-generation. The following is a summary of each EDC’s process for sending net meter information via EDI. Various inconsistencies exist across the EDC’s Net Meter reporting…

* WPP, PECO and PPLEU – similar in structure except PECO will have two meters, one registering consumption while the other registers the customer generation. PPLEU sends zero KWH in the billed loop and the customer’s generation (KWH) in the summary loop. PECO and WPP send zero KWH in both the billed and summary loops. All three EDCs correctly report the meter role with ‘A’ present for the consumption loop and ‘S’ present for the customer generation. Lastly, all three EDCs provide the applicable customer generation quantity qualifier(s) in the QTY of the PM loop.
* First Energy – FE does not loop the PM according to the meter role. Both the consumption and the co-generation are reported in the same PM loop with ‘A’ as the meter role. This causes billing problems for suppliers who trigger off the meter role and therefore add the co-generation instead of subtracting from the consumption. Ernie Mathie (First Energy) states FE believes the EDI guides are not clear on the use of the meter role. FE supports the applicable co-generation quantity qualifiers in the QTY within the meter loop. Additionally, FE is unique in signing the KWH quantity negative in the Billed and Summary loops when the customer generation is greater than the consumption. Suppliers commented using a negative sign in the KWH quantity is not a normal practice. EDEWG also notes the negative sign forces the Supplier to credit the customer when customer generation is greater than consumption. This practice contradicts CHARGE which recently reported the EGS must only credit excess customer generation if such a credit is in the customer contract.
* Duquesne Light & UGI – neither DLCO nor UGI are providing the subtractive meter role or net metering quantity qualifiers in their EDI 867 transactions for customer co-generation accounts. Both companies do provide the net KWH, however the Supplier is unable to determine if the usage is for an account with customer generation present. DLCO has stated their limitation is due to their billing system which requires manual intervention to correct the KWH on net metered accounts. This also requires DLCO to issue a cancel/re-bill in certain circumstances. UGI has stated their virtual net metering process presents challenges of their own.

The EDEWG leadership will develop a white paper on the current state of net metering / customer co-generation usage reporting in Pennsylvania. This document will only report existing practices and be used to determine the next steps towards standardization across Pennsylvania EDCs. This document will be presented to EDEWG prior to the July meeting.

## EDC processes for calculating & sending NSPL/PLC updates

During the January meeting, Matt Sigg inquired about the process for sending NSPL / PLC changes to the EGS. The understanding is the NSPL would include an effective date of 1/1/2011. In one case, an EDC sent 1/3/11 stating 1/1/11 was a holiday. This causes an issue with some EGS systems. Another question was raised around the sending of both the NSPL and PLC updates in the same EDI 814 Change Request transaction, both with an effective date of 1/1/11. While the NSPL was not questioned, the EGS is uncertain if the PLC value is the current value or the value which would not take effect until 6/1/11. To date, NSPL/PLC update processes have been received and documented for each EDC.

During a recent EDI meeting in NJ, it was reiterated that one LDC (PSE&G) reports Capacity Obligation instead of Peak Load Contribution. When questioned the difference, it was reported PSE&G applies a zonal scaling factor to the PLC value. The PA EDCs were each asked to report whether they’re providing the PLC value from PJM or if the zonal scaling factor or any other modification is being made to the PLC prior to submission to the EGS. Each PA EDC responded stating they’re sending Capacity Contribution not Obligation.

CHARGE recently discussed a concern for the current process of obtaining future NSPL/PLC values. The current process sends the future values via 814C on current EGS customers. However there are timing constraints where an EGS may be requesting HU data on prospective customers prior to the date in which the new values take effect. In this scenario, the EDC provides the current NSPL/PLC values, not the future values. EDEWG was asked to gauge interest in providing the future values within an EDI transaction set. This is the precursor to EDI CC #087 listed above under 3b. Unfortunately, EDEWG was unable to reach consensus on EDI CC #087 as stated above.

EDEWG leadership will draft a white paper on the current state of PLC/NSPL value maintenance in PA. This document will only report existing practices for use to discuss the next steps towards standardization and reporting of all necessary PLC/NSPL values. The document will be presented to EDEWG prior to the July meeting.

## Smart Meter PA / Meter Data Access

EDEWG has re-convened the Smart Meter Sub-Team as outlined in the joint Preliminary Proposal for the Development of Smart Meter Data Exchange Standards filed by EDEWG with the PAPUC on December, 7th 2009. Sue Scheetz (PPLEU) is leading the sub-team along with the assistance of Joe Bisti (PECO) to carry forth the plan in the proposal. The sub-team is currently comprised of a member of the EDEWG leadership team and representatives from each of the EDCs. The team is working to develop a roadmap, definitions straw man, and draft the initial business requirements necessary to comply with the 2009 EDEWG proposal.

Current status: PPLEU has composed a straw man document which outlines their presumed compliance with their smart meter plan filed with the Commission. Currently, none of the EDCs are in sync, some have recently filed their plans while other EDCs are in work implementing their plan and PPLEU believes they’re in compliance. Once the EDC straw man documents are complete, the sub-team will publish a consolidated document. At that time, the sub-group will be opened to Suppliers, Service Providers, and 3rd parties interested in participating in the group.

The next meeting of the EDCs in the sub-group is scheduled for June 20th.

## New Business

## First Energy – Brandon Siegel inquired to the tentative date for West Penn Power’s cutover to First Energy’s SAP system. Ernie Mathie (First Energy) reported the tentative cutover date is late 1Q 2012. The actual cutover date and additional migration details will likely be discussed during First Energy’s ongoing Supplier meetings.

## Next Meeting

Due to the Independence Day holiday, the next meeting will be held on Thursday, July 14th, 2011. To participate, please dial 1-866-844-1871 with PIN 2551.

This conference line has a limited number of lines available. The EDEWG leadership respectfully requests those in the same physical location meet in a central location sharing one line. Please note, for your convenience, we try to schedule an additional 5 minutes before and 10 minutes after each conference call, at no cost, to allow participants to call in to be ready at the conference start time. This is available as long as there are no conflicts with adjacent conference calls.

If you have NOT requested the Chairperson services for this bridge, THEN please ignore the Chairperson voice prompt.