EDEWG Change Request #145

This EDEWG Change Request can be found on the PUC website at <http://www.puc.pa.gov/electric/electric_edewg_download.aspx>

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| **Requester’s Name**:  Monica Neibert | **EDC/EGS Name**:  Energy Services Group on behalf of Citizens Electric and Wellsboro Electric | **Phone #** :  781-347-9039 |
| **Date of Request**:  2/8/2018 | **Affected EDI Transaction Set #(s)**:  810LDC | **E-Mail Address**:  [mneibert@energyservicesgroup.net](mailto:mneibert@energyservicesgroup.net) |
| **Requested Priority** (emergency/high/low): Low | **Requested Implementation Date**:  N/A – Admin Only (already live) | **Status**:  APPROVED / Implemented into IG810LDCv6-5.docx |

**Brief Explanation** (This will be copied into the description in the Change Control Summary Spreadsheet):

Incorporate Citizens and Wellsboro into regional IGs.

**Detail Explanation** (Exactly what change is required? To which EDEWG Standards? Why?):

Update Pennsylvania Notes pages 9 to add that Citizens and Wellsboro support Dual and Rate Ready.

Update Pennsylvania Notes pages 11 – 14 with Citizens, Wellsboro practices.

Update Rate Ready Practices in Pennsylvania table on page 14.

(See pages 1 and 2)

**For Change Control Manager Use Only:**

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| Date of EDEWG Discussion:  5/3/2018 | Expected Implementation Date:  N/A – Admin Only |  |

**EDEWG Discussion and Resolution**:

2/15/2018: Brandon Siegel: Reviewed CC & placed into temporary hold pending completion of all C&W change requests

2/15/2018: Brandon Siegel: Incorporated into IG810LDCv6-5.docx

4/5//2018: Brandon Siegel: C&W change requests finalized, assigned #145 & placed on May meeting agenda.

5/3/2018: Brandon Siegel: EDEWG approved without revision, already implemented into IGs.

***Priority Classifications***

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| *Emergency Priority* | *Implemented within 10 days or otherwise directed by EDEWG* |
| *High Priority* | *Changes / Enhancements implemented with 30 days. The next release, or as otherwise directed by EDEWG* |
| *Low Priority* | *Changes / Enhancements implemented no earlier than 90 days, Future Release, or as otherwise directed by EDEWG* |

***Please submit this form via e-mail to both the PUC at*** [jmccracken@pa.gov](mailto:jmccracken@pa.gov) ***and*** [lyalcin@pa.gov](mailto:lyalcin@pa.gov) ***and to the***

***Change Control Manager, Brandon Siegel at*** [brandon.siegel@intelometry.com](mailto:brandon.siegel@intelometry.com)

*Your request will be evaluated and prioritized at an upcoming EDEWG meeting or conference call.*

# *Pennsylvania Notes*

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| Billing Information: |  | * Duquesne – Supports Rate Ready and Bill Ready * First Energy (MetEd, Penelec, Penn Power, West Penn Power) – Supports Rate Ready and Bill Ready. All operating companies follow First Energy rules * PECO – Supports Bill Ready Only. * PPL EU – Supports Rate Ready, Bill Ready, and EGS Consolidated Billing. * UGI – Supports Rate Ready Only. * Citizens – Supports Dual and Rate Ready * Wellsboro – Supports Dual and Rate Ready |

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| Changing Due Dates on Rate Ready Bills |  | A change in a due date will either result in a cancel/re-bill or sending of a duplicate 810.   * Duquesne – Will cancel and re-bill if due date changes * First Energy – Will cancel and re-bill if due date changes * UGI – Will cancel and re-bill if due date changes * PECO – Does not support Rate Ready Billing * PPL EU – Supplier payment is based on the date the bill was issued, not based on due date. In the event a due date change actually impacts the supplier, PPL EU will cancel/re-bill the account. * Citizens – Due Dates do not change * Wellsboro – Due Dates do not change |
| Budget Billing |  | **Duquesne**  * Rate Ready - Provides option for budget billing for both LDC and ESP charges to all residential customers. The budget amounts are based on the average usage over the previous 12- month period. * Bill Ready –Duquesne will only calculate a budget for the distribution charges. The ESP has the option to budget their charges in the 810 invoice. The Supplier will be paid on the amount sent in the bill ready 810. The ESP will be responsible for maintaining the customer’s budget bill balance for ESP charges. The customer must contact the ESP directly regarding budget bill of ESP charges.  **PECO** PECO’s process for LDC Consolidated Billing:   * The ESP enrolls the customer (814 Enrollment Request) * PECO responds and informs the ESP if the customer is budget billed using the LDC Budget Billing Status on the 814 Enrollment Response * PECO passes the total usage to the ESP on the 867 * The ESP passes their total charges (not budgeted charges) to PECO on the 810 * PECO calculates the customer’s budget bill for both the ESP and LDC portion of the bill. * PECO pays (in 20-25 days) the ESP for the ESP’s total undisputed dollars (not the customer’s budgeted dollars). * The Budget is between the PECO and the Customer.  **PPL EU** PPL EU handles the budget with the customer directly, including supplier charges. The supplier is expected to send actual charges in Bill Ready and will be paid based on actual charges for both Bill Ready and Rate Ready. A customer may not be on budget billing with PPL EU for EGS Consolidated Billing **UGI**   * Contact UGI supplier information for details on budget billing.   **First Energy**   * Rate Ready – FirstEnergy will automatically budget ESP charges when customer is on budget billing with FirstEnergy. Supplier will be paid on actual charges. * Bill Ready – FirstEnergy does not budget automatically budget bill ESP charges under bill ready. The ESP has the option to budget their charges and send a ‘budgeted’ amount in the bill ready 810 invoice. Supplier will be paid on the amount sent in the bill ready 810 The ESP will be responsible for maintaining the customer’s budget bill balance for ESP charges. The customer must contact the ESP directly regarding budget bill of ESP charges.   **Citizens & Wellsboro**   * Citizens supports Budget Billing. Budget EGS charges when customer is setup on budget with EDC &  remit payment based on customer payment. |
| Rate Ready EDC – Re-Bill Process for Tax Rate Change |  | Process for each Rate Ready LDC when there is a re-bill situation across a change in the tax rate for ESP charges.  **Duquesne Light** – This rate is effective for a period of time until a new rate is provided with a new effective date.  Any cancel/re-bill uses the rate with the effective date for the period being canceled and re-billed.  State sales tax is hardcoded into our programming, so if that were to change and we had to cancel/re-bill, the new value would be used no matter the time period the bill was for.  **First Energy –** The cancel/re-bill uses the tax rate effective for the period being canceled and re-billed.  **PPLEU –** Any cancel /re-bill would use the tax rate in effect at the current time.  For GRT we would use the percentage that is currently stored when generating informational messages on the customer's bill. **UGI –** Gross receipts tax (GRT), along with any other state taxes the supplier is recovering, is embedded in the rates the Supplier provides UGI for use in rate ready billing.  This rate is effective for a period of time until a new rate is provided with a new effective date.  Any cancel/re-bill uses the rate with the effective date for the period being canceled and re-billed. State sales tax is hardcoded into our programming, so if that were to change and we had to cancel/re-bill, the new rate would be used even for older periods of time. **Citizens –** The cancel/re-bill uses the tax rate effective for the period being canceled and re-billed.  **Wellsboro** - The cancel/re-bill uses the tax rate effective for the period being canceled and re-billed. |
| Rate Ready LDC – Re-Bill Process for Tax Exemption Percentage Change |  | Process for each Rate Ready LDC when there is a re-bill situation across a change in the ESP tax exemption percentage.  **Duquesne Light** – When the ESP changes tax exemption percentage, Duquesne will execute a cancel / re-bill, and the new value would be used no matter the time period the bill was for.  **First Energy** – The cancel/re-bill uses the tax exemption percentage effective for the period being canceled and re-billed.  **PPLEU** –stores a single field on the customer account for the taxable percentage for the supplier. Any cancel /re-bill would use the tax rate in effect at the current time.  **UGI** – stores a single field on the customer account for the taxable percentage for the supplier.  If the supplier changed this percentage and UGI canceled/re-billed, the new value would be used no matter the time period the bill was for.  **Citizens –** The cancel/re-bill uses the tax exemption percentage effective for the period being canceled and re-billed.  **Wellsboro** **–** The cancel/re-bill uses the tax exemption percentage effective for the period being canceled and re-billed. |

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| **Description of Rate Ready Business Practice** | **Duquesne** | **First Energy** | **UGI** | **PPL EU** | **Citizens** | **Wellsboro** |
| Sends “N” (No allowance or charge indicator in SAC01) for Late Payment Charges | Does not support ESP Late Payment Charge | Does not support ESP Late Payment Charge | Does not support ESP Late Payment Charge | Does not support ESP Late Payment Charge | Yes, Supports Late Payment Charge | Yes, Supports Late Payment Charge |
| Sends “N” (No allowance or charge indicator in SAC01) for Adjustments | Yes | Does not apply adjustments to supplier charges | Yes | Does not apply adjustments to supplier charges | Yes, supports adjustments | Yes, supports adjustments |
| Sends signed amount in SAC05 for credited Adjustments | Yes | N/A | Yes | N/A | N/A | N/A |
| What cross reference number is supported on a cancel 810 – the original 867 xref or the cancel 867 xref? | BIG05=Cancel 867 BPT02  REF\*OI = BIG02 from original 810 | BIG05= Original 867 BPT02  REF\*OI = BIG02 from original 810 | BIG05= Original 867 BPT02  REF\*OI = BIG02 from original 810 | BIG05= Original 867 BPT02; REF\*OI = BIG02 from original 810 | BIG05= Original 867 BPT02; REF\*OI = BIG02 from original 810 | BIG05= Original 867 BPT02; REF\*OI = BIG02 from original 810 |