EDEWG Meeting 7/14/2011

**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, Energy Services Group, PPL Solutions, EC InfoSystems, GDF Suez, BlueStar Energy, Dominion Retail, First Energy Solutions, Direct Energy Business, and TriEagle

**Agenda:**

1. Introductions & Roll Call
2. Approve June Meeting Minutes
3. PUC Tentative Order – EDEWG expectations under Smart Meter Implementation Order
4. CHARGE/PUC Secretarial Letter – Presentation of Taxes on Bills
5. EDI Change Control

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

CC #088 – 810LDC – PECO to 80 Characters in SAC15

CC #089 – 814E – Add MTI as secondary service reject reason code

1. Net metering / Cogeneration in Pennsylvania
2. NSPL/PLC update process in Pennsylvania
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 and facilitated the meeting. Other EDEWG leadership present: Sue Scheetz (PPLEU, Utility Co-chair) and Matt Sigg (Constellation New Energy, Supplier Co-Chair)

## Approve Meeting Minutes

## The June meeting minutes were approved without revision

## PUC Tentative Order – EDEWG expectations under Smart Meter Implementation Order

On July 8th, 2011 the PUC issued a tentative order detailed EDEWG expectations under the Smart meter Implementation Order. The EDEWG leadership was each served with a copy of the tentative order. Leadership has meet on three separate occasions to review and discuss the tentative order.

EDEWG leadership will file comments to the PUC regarding this order. These comments will not be consolidated EDEWG comments but rather from the leadership team. Each market participant is encouraged to review the tentative order and file comments accordingly from their respective company.

The leadership will file its comments prior to the deadline posted within the tentative order.

## PUC Secretarial Letter – Presentation of Tax on Customer Bills

On July 7th, 2011 the PUC issued a secretarial letter issuing guidance on the placement of tax information on residential customer bills.

Estimated PA State Tax (Miscellaneous or MST) is not required to be reported by the EGS under dual or EDC Consolidated billing. This tax applies to the EDC as well as Suppliers offering EGS consolidated billing.

The letter also provides guidance on State Sales tax and Gross Receipts Tax. All EDEWG members are recommended to read the secretarial letter to ensure compliance.

## 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 has been removed due to the PA PUC Secretarial Letter pertaining to Presentation of Tax on Customer Bills. Additional changes have been made recommending EGSs pass Sales Tax as additive on both Residential and Commercial bill ready invoices. EDI CC 79 will be updated and sent to the list server with the meeting minutes. All EDEWG members should be prepared to discuss and approve EDI CC 79 during the August meeting.

## EDI Change Control #088 – 810LDC: PECO SAC15 to 80 Characters

Joe Bisti (PECO) briefed the group on EDI Change Control 88 which increases PECO’s SAC15 limit to 80 characters. Currently PECO’s EDI translator will accept up to 65 characters instead of the 55 characters published in the current EDI 810 IG. PECO will implement the change increasing their acceptance to 80 characters in the SAC15 by August 31st, 2011. Joe confirmed PECO will fully support bill print of 80 characters once the EDI change is made. EDEWG discussed the change and it was approved without revision. EDI CC 88 will be updated and sent to the list server with the meeting minutes.

##  EDI Change Control #089 – 814E: add MTI reject code for secondary services

Joe Bisti (PECO) briefed the group on EDI Change Control 89 which adds the MTI (Maintenance Type Code (ASI02) Invalid) to the secondary services reject reason codes in the 814E. PECO will begin using this code when an EGS inaccurately applies an invalid ASI02 code in the secondary service request. PECO reported instances where the EGS is using ‘021’ in the ASI02 when requesting Historical Usage (029). EDEWG discussed the change and it was recommended to review and update the reject reason codes across all services under the REF7G. Brandon Siegel will add this to EDI CC 89 which EDEWG approved. EDI CC 89 will be updated and sent to the list server with the meeting minutes.

## 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 which has since been escalated to CHARGE for resolution.

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. Due to other EDEWG activities, this document has been delayed until the August or September meetings.

## 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. Due to other EDEWG activities, this document has been delayed until the August or September meetings.

## 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: The sub-group’s next meeting will be held on July 18th. The group will continue work on their straw man document and review the recent PUC Tentative Order discussed under item 3 above.

## New Business

* PPLEU requested an update to EDI Change Control 85 which adds an optional REF03 to the REFKY (Special Meter Configuration) segment. This additional element will enable the EDCs to report the maximum capacity (KWH) of the co-generation device reported in the REF02. PPL inquired if Suppliers would like to receive this information. EDEWG stated this would be good information if PPLEU is willing to provide. PPLEU will move forward with adding this to their implementation of EDI CC 85. Brandon Siegel will ensure the REF03 is added to EDI CC 85.

## Next Meeting

The next meeting will be held on Thursday, August 3rd, 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.