EDEWG Meeting 3/7/2013

**Utilities:** PECO, Duquesne Light Company, First Energy, PPLEU, and UGI Utilities

**Suppliers/Service Providers**:

Ista North America, Constellation, Dominion Retail, Energy Services Group, GDF Suez, UGI Energy Services, Direct Energy, First Energy Solutions, PPL Solutions, Liberty Power, EC Info Systems, Energy Plus, AEP Energy, Accenture, Duquesne Light Energy and Systrends

**Other:** Matt Wurst - PAPUC Staff

**Agenda:**

1. Roll Call
2. Approve February 7th meeting minutes
3. EDI Change Control

EDI CC 85 – Confirm specific implementation dates by EDC

EDI CC 87 – Confirm specific implementation dates by EDC & provide samples.

                  EDI CC 105 – Add support for ‘banked’ generation adjustments in the 867MU & 867IU transaction sets.

1. Annual update of regional EDI Guides – discussion/approval of redlines
2. Update EDI Testing Contacts document (attached)
3. Review EDC lead times spreadsheet (attached)
4. Revised Plan – discussion/approval (originally sent 2/4, same versions attached)
5. Web Portal Working Group – status update & charter (attached email)
6. Duquesne Light FOCUS project - status update
7. New Business
8. Next Meeting

 **Meeting Notes:**

## Introductions & Roll Call

Brandon Siegel (ISTA-North America) commenced roll call while Matt Sigg, Constellation (Co-Chair-Supplier) facilitated the meeting. Other EDEWG leadership present: Matt Wurst (PA PUC Staff) and Sue Scheetz, PPLEU (Co-Chair Utility)

## Approve Meeting Minutes

## The February meeting minutes were approved without revision.

## EDI Change Control

## EDI Change Control #85 & 87 Implementation Dates by EDC

Duquesne Light – January 2014

First Energy – Approx 6/21/2013

UGI- within next 30 days

PECO – 6/14/2013 (note 867HU & HI portions of CC85 will be 4/13/2013)

PPLEU – CC85 live, CC87 5/1/2013

EDCs were asked to send X12 samples of CC 87 to Brandon Siegel once they’re available.

## EDI Change Control 105 – support for banked generation adjustments

Brandon Siegel presented EDI CC 105 as a result of recently learning FirstEnergy and PPLEU follow a process where excess customer generation is banked then applied to first subsequent month where consumption is greater than generation. CC105 would place an additional segment in the BB loop to inform suppliers banked KH was being adjusted in the billed KH amount. After much discussion, the group agreed the extra segment was unnecessary though an explanation of the practice should be added to the PA notes section of the 867MU & 867IU transaction sets.

The second part of EDI CC 105 requested to add a new qualifier (BR) to the QTY01 in the BQ loop of the EDI 867IU. This is to support FirstEnergy’s process of applying banked KH to an interval metered account’s detail reading(s). FirstEnergy added they are investigating the possibility of passing the original meter readings in the BQ which would eliminate the need for the banked KH adjustment qualifier.

Action items…

* Brandon to update CC105 to remove the new segment in the BB loop of the 867MU/IU & replace with a paragraph explaining the banked KH process.
* Duquesne, PECO, and UGI to confirm if they follow the banked process similar to FirstEnergy & PPLEU. If so, they will also confirm if they apply the adjustment into 867IU detail reading(s).
* FirstEnergy to confirm the 867IU process and if the banked KH could be eliminated from the BQ. If banked KH to remain in BQ, EDEWG to then determine if the proposed QTY\*BR is viable or not.

CC 105 will be updated and sent to the list server along with the meeting minutes.

## Annual version update of regional EDI guides

Minor administrative comments were received and will be incorporated into the final version. No objections were made and the red lined documents were approved for PA. Brandon will begin working on the final version for regional distribution next week. Thank you to all of the parties who took the time to review the documents and submit comments.

## Testing Contacts Document Update

The updated version of the testing contacts document was sent with the meeting minutes. Parties are asked to review to ensure their contact information remains correct. Send any updates directly to Brandon.

## Review EDC Lead Times spreadsheet

As a result of the recent changes to the customer switching timelines, Matt Sigg compiled a spreadsheet documenting each EDC’s switching timelines. Duquesne originally provided information pertaining to their future system and was asked to provide the information for their current system.

## EDEWG Revised Plan Subgroup – Redline Draft

The updated version of the revised plan was approved without additional comment or revision. Leadership will file the new version with the Commission.

## Web Portal Working Group Update

Matt Wurst briefed the group on the email attached to the meeting agenda which contained the draft charter of the WPWG. Joe Bisti (PECO) voiced concern regarding the non-consensus section in the charter. After follow up discussion, Matt Wurst will work with Joe to update the section. Once complete Matt Wurst will distribute the updated charter and request parties submit any comments back no later than 3/21/2013.

## Status update on Duquesne Light’s 2013 System Replacement (FOCUS Project)

Duquesne Light provided a status update on DLC’s 2013 Customer & Billing system replacement.

Key points regarding the FOCUS project…

* The go-live has been moved from 2Q 2013 to December 2013, exact date TBD.
* Testing continues with the small subset of volunteer suppliers/providers.
* DLC reported EDI CC 85, 87 and 103 along with the 867HI remain for a January 2014 implementation and have not been delayed with the change in the go-live date.
* In the FOCUS system, DLC will be sending a 4 decimal value to report consumption data in the EDI 867 transaction sets. (Ex: 871.1234 ) No EDI change control is necessary as the existing EDI implementation guidelines (data dictionary) support 4 numbers to the right of the decimal for the QTY02, MEA03, MEA05, and MEA06 elements. Suppliers and service providers should confirm their systems are able to support the new value.
* DLC is planning a conference June 2013 in Pittsburgh to provide further details regarding the FOCUS project.
* Any market stakeholder with questions or concerns pertaining to DLC’s new system should email Supplier Support (DLC\_SSC@duqlight.com) with ‘FOCUS’ in the subject line

## New Business

* Ernie Mathie (FirstEnergy) reminded all Suppliers to NOT send the EDI 810 Cancel (BIG08 = 01) in response to FirstEnergy’s EDI 867 Cancel. In September 2012 FirstEnergy implemented the auto cancel feature which automatically cancels the supplier invoice referencing the cancelled usage. The supplier is permitted to send the EDI 810 Reversal (BIG08=17) in cases where invoices are to be cancelled NOT related to usage cancellations.
* Joe Bisti (PECO) raised a question regarding the 867IU and PECO’s “Same Day Final” practice. The same day final occurs when a customer requests disconnection as of the last billing date. When this occurs, PECO will follow up the regular 867MU/IU with another 867 Final containing the same start/end date. PECO questioned how suppliers would like to receive the 867IU in the same day final transaction. Kim Wall (PPL Solutions) and Brandon Siegel both stated they would prefer PECO not send the same day final 867s. However if they must receive them, for the 867IU only send the 1st interval under the detail loop. PECO will inquire internally if they’re able to suppress the same day final.
* Sue Scheetz (PPLEU) made a few announcements:
	+ PPLEU is rolling out their new Supplier Portal tentatively schedule for 3/18/2013. On 3/14 @ 2PM they will hold a webinar to demo the new portal. A communication was sent to the supplier email distribution. Anyone who did not obtain the email and would like webinar information may contact PPL Supplier Support (PPLUtilitiesSupplier@pplweb.com)
	+ PPLEU will hold a Supplier Conference on June 5-6, 2013 in Bethlehem, PA. The communication was sent to the supplier email distribution. Anyone who did not obtain the email and would like information regarding the conference may contact PPL Supplier Support (PPLUtilitiesSupplier@pplweb.com)
	+ In August, PPLEU is planning to implement an ‘instant connect’ process where under certain circumstances a customer will be able to start service with a supplier. Details of this process will be communicated by PPL at a later date.
* Under the [Retail Markets Investigation Final Order](http://www.puc.pa.gov/pcdocs/1214105.docx) (p.69-75), the PUC directs all EDCs to submit plans for seamless move and instant connections by end of 2013 to be implemented by June 1, 2015. In recent months multiple EDCs have collaborated together to develop a matrix of business practices/scenarios. EDEWG agrees this process should continue and the scope be expanded at some point to include supplier involvement and EDI implications. Sue Scheetz and Joe Bisti have lead the collaboration and were asked to discuss the next steps on how to move forward possibly in an EDEWG sub-group or other forum as necessary. This topic will be revisited during the April EDEWG teleconference.

## Next Meeting

The next regular monthly EDEWG meeting will be held on Thursday, April 4th, 2013 at 2PM ET. The number is **312.777.1429   PIN:  2203616#**. Thank you to PPL Electric Utilities for hosting our conference calls.