EDEWG Meeting 5/12/2011

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

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

**Other**: PUC

**Agenda:**

1. Introductions & Roll Call
2. Approve April Meeting Minutes (attached)
3. 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. EDC Process for calculating & sending NSPL/PLC updates
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) and Annunciata Marino (PAPUC, Staff Liaison)

## Approve Meeting Minutes

## EDEWG approved the April 2011 meeting minutes without comment or revision.

## 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 is currently working on providing their list of applicable REF02 codes and hopes to complete by early June.

EDEWG requests each EDC review CC #085 and report an implementation timeline during the June EDEWG meeting. EDI Change Control #085 remains open pending additional EDEWG review with approval vote scheduled for the June EDEWG meeting.

## 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 requests each EDC review CC #087 and report an implementation timeline during the June EDEWG meeting. EDI Change Control #087 remains open pending EDEWG review with an approval vote scheduled for the June EDEWG meeting.

## 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.

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 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.

## 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 #085 listed above under 3b.

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.

## 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. PPLEU has composed a straw man document which outlines their presumed compliance with their smart meter plan filed with the Commission. The other EDCs are reviewing the straw man document for discussion during the June meeting of the sub-group.

Once these items are complete, the sub-team will be opened to all Suppliers, Service Providers, and 3rd parties interested in participating. The date of this meeting has yet to be determined by the sub-team. The team is meeting every other week until their deliverables are complete.

Ernie Mathie reported First Energy has convened an internal team to address their smart meter plan and participate in the EDEWG sub-group. Ernie will remain active, however another FE’s additional representative will participate to focus on the details pertaining to the smart meter plan.

## New Business

## First Energy – Ernie Mathie reminded suppliers who switch customers internally from bill ready to dual billing to send the EDI 814 Bill Option change transaction. Brandon Siegel reiterated the importance of this required business process which mitigates customer and EDC confusion. Bill option changes are required regardless of the EDC service territory.

## First Energy - Ernie Mathie reported West Penn Power will be migrated over to First Energy’s SAP system, actual cutover date TBD. FE will require EGS’ to conduct a yet to be determined level of EDI certification. Existing Suppliers in the WPP territory will be tested initially with new Suppliers being tested afterwards. The entire migration process will be communicated to all Suppliers once the details have been completed by First Energy. FE anticipates testing to begin sometime during the 4th Quarter of 2011.

## UGI – Angela DeLong (UGIES) reported for UGI Utilities stating Central Penn Gas will be migrating towards EDI support for retail choice customers. EDI testing will begin in June of 2011 with a tentative production cutover in late July or early August pending PUC approval. Gas Suppliers interested in EDI with CPG should contact UGI Supplier Services Deparment.

## Next Meeting

The next meeting will be held on Thursday, June 2, 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.