

# OEB GDAR EBT Standards Working Group

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## Minutes for Feb 21/22/23, 2006 – DRAFT

<p><b>ATTENDEES: February 21, 2006</b> 11:00am – 5:00pm</p> <p>Darcy Hewgill            Direct Energy          Karen Cooke            Direct Energy (11 am – 3 pm)          Avery Rhijnsburger    Enbridge          Kate Kelly                Enbridge          Jason Munroe            Enbridge          Rick Kathuria            Energy Savings          Nola Ruzyccki            Energy Savings (1 pm – 2 pm)          Tom Stark                 Extensys          Loraine Baillargeon    Kitchener Utilities          Shiraz Ladha             Superior (1 pm - 5 pm)          Mark Van Praet          Union Gas          Chris Ripley              Union Gas          Russ Houldin            OEB (1 pm – 5 pm)          Barb Robertson         OEB</p>	<p><b>ATTENDEES: February 22, 2006</b> 9:00am – 5:00pm</p> <p>Darcy Hewgill            Direct Energy          Karen Cooke            Direct Energy          Avery Rhijnsburger    Enbridge          Jason Munroe            Enbridge          Kate Kelly                Enbridge          Tom Stark                 Extensys          Rick Kathuria            Energy Savings          Loraine Baillargeon    Kitchener Utilities          Mark Van Praet          Union Gas          Chris Ripley              Union Gas          Russ Houldin            OEB          Barb Robertson         OEB</p>
<p><b>ATTENDEES: February 23, 2006</b> 9:00am – 3:00pm</p> <p>Darcy Hewgill            Direct Energy          Karen Cooke            Direct Energy          Avery Rhijnsburger    Enbridge          Jason Munroe            Enbridge          Kate Kelly                Enbridge          Tom Stark                 Extensys          Rick Kathuria            Energy Savings          Loraine Baillargeon    Kitchener Utilities          Mark Van Praet          Union Gas          Chris Ripley              Union Gas          Russ Houldin            OEB          Barb Robertson         OEB</p>	

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ADMINISTRATION		
Item	Discussion	Action Items
1. Review Minutes from Feb 15/16	Minutes were accepted.	•

ACTION ITEMS FROM PREVIOUS MEETINGS (IF APPLICABLE)		
Item	Discussion	Action Items
1. Alpha-numeric definitions	<ul style="list-style-type: none"> <li>• A definition for alpha-numeric does not exist.</li> <li>• String prevails unless there is a specific pattern identified (such as postal code).</li> <li>• “Alpha / /Numeric (A/N)” in IGs will be changed to “string”</li> </ul>	•
2. Transfer Reject Enumerated parameter list for Additional Information	<ul style="list-style-type: none"> <li>• Enbridge will include enumerated list in IG comments. Union does not have any.</li> </ul>	
3. Collision Matrix	<ul style="list-style-type: none"> <li>• Collision matrix was updated and issued to WG.</li> </ul>	

NEW BUSINESS		
Item	Discussion	Action Items & Prime

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<p>1. Termination of Service</p>	<ul style="list-style-type: none"> <li>• Reviewed STR – Termination of Service (TOS)</li> <li>• TOS will be sent when account is finalized for Enbridge, when meter removal work order is created for Union (equals finalization)</li> <li>• Drop and TOS have different business rules, different requirements and lead times – reason for proposal of 2 transactions</li> <li>• Reviewed TOS Implementation Guide</li> <li>• Group to review TOS internally and return with comments at next WG meeting</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Mark</b> to add flow for canceled TOS followed by a CCL</li> <li>• <b>All</b> to review IG's</li> <li>• <b>Avery</b> to determine feasibility of providing separate reason codes for “force-out” and “unknown”</li> </ul>
<p>2. Change Consumer Location</p>	<ul style="list-style-type: none"> <li>• Reviewed EBT Standards and proposed wording changes from previous meetings (Barb)</li> <li>• If customer is moving and elects to terminate the relationship with the vendor, the distributor will issue independent drop and CCL transactions to the vendor. If the customer changes their mind, the vendor will terminate the drop.</li> <li>• STR-CCL is required from Distributor.</li> <li>• Enbridge does not assign account number until the consumer moves in. Enbridge proposed to provide CCL when move happens.</li> <li>• Working assumption - need gap time limit for move lag scenario – Parties agree that 60 days from move out date is sufficient.</li> <li>• Parties agree that Distributor will notify vendors of CCL when it is known.</li> <li>• One account per enroll – a move overlap scenario does not result in a vendor flowing at both the old and new addresses</li> <li>• If there is a lag, Distributor sends a TOS first and a CCL when the lag is realized (assuming TOS remains a transaction). If TOS has not taken effect, a TTR-TOS will be sent.</li> <li>• Only a CCL will be sent if there is no gap or there is an overlap. SA-NED used to update transaction.</li> <li>• Following a TOS and the distributor determines the consumer move within 60 days, the distributor will issue a CCL to seamlessly move the consumer.</li> <li>• Enbridge will not automatically CCL consumers that are on a contract rate (typically &gt;340,000 m3 annual consumption).</li> <li>• On an overlap, the move out date will equal the move in date.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>All</b> to consider the appropriate transaction for CCL from the vendor – SA or STR. Deadline of Tuesday February 28th for SA-CCL decision – or if needed at all</li> <li>• <b>All</b> to consider</li> </ul>

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	<ul style="list-style-type: none"> <li>• A backdated CCL in the same delivery area will result in a back dated billing for Union. Enbridge to consider.</li> <li>• If the Gap is known (move out date and move in date are known) a CCL will be issued by the distributor.</li> <li>• Two options for Enbridge to update CCL with account number once known: through a CCI or SA-CCL. The CCI will point to the account number where the information change is applicable.</li> <li>• How would vendor drop consumer at new location? Avery proposed that if any request is received at the old account number Enbridge will process the request. When the vendor is made aware of new account number, the vendor must use the new account number</li> <li>• Parties agree that Enrols will be accepted during pending moves. (Matrix to be updated by Mark).</li> <li>• Parties to consider requiring initial transactions to be an STR, not an SA. SA's are exclusively for referencing or updating STRs. To be decided on Tuesday, February 28, 2006.</li> <li>• Reviewed CCL IGs.</li> <li>• Parties agree that same CCL STR will be used for all infranchise moves – including same delivery area or inter-delivery area.</li> <li>• Inter-delivery area move – Vendor reply - vendor will provide contract and price point id through SA-CCL or Distributor holds CCL for 60 days following notification and vendor re-enrols customer – to be discussed next week</li> <li>• The 60 day Clock starts ticking when vendor receives inter-delivery area CCL.</li> <li>• The vendor will provide the effective date for inter-delivery area moves</li> <li>• If the contract and price point ID are provided before 7 days before move effective date, the move will happen seamlessly.</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>
3. Status of IGs	<ul style="list-style-type: none"> <li>• All WG participants are to review the Enrol, Drop and Transfer transactions internally and provide comments to Barb by February 28<sup>th</sup>.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>All</b></li> </ul>

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4. MDV Discussion	<ul style="list-style-type: none"> <li>Meeting with vendors and Enbridge at 3:00 pm on Thursday March 2, 2006 at OEB offices to discuss MDV amendments</li> </ul>	•
5. Working Schedule	<ul style="list-style-type: none"> <li>Continue to meet three days each week for weeks of February 27<sup>th</sup> and March 6<sup>th</sup>.</li> <li>Tentative - WG will not meet the week of March 13<sup>th</sup> and use the week to review the materials developed to date.</li> <li>WG to determine working schedule post March break. Proposal by Union to meet Monday and Tuesday each week.</li> </ul>	•

NEXT MEETING		
Item	Discussion	Lead
Logistics	<ul style="list-style-type: none"> <li>Dates/Times: Tuesday February 28, 2006 – <b>11:00am</b> to 5:00pm Wednesday March 1, 2006 – 9:00 am to 5:00 pm Thursday March 2, 2006 – 9:00 am to <b>3:00</b> pm</li> <li>Location: Offices of OEB, 2300 Yonge St., Toronto, 5<sup>th</sup> Floor “Baby Board Room”</li> <li>Conference Call Bridge <b>416-212-0400</b> Pass Code <b>6652#</b></li> </ul>	
Minute Taker	<ul style="list-style-type: none"> <li>Direct Energy</li> </ul>	
Agenda Items	<ul style="list-style-type: none"> <li>Review Change Consumer Location IGs</li> <li>Status Advice – identification of elements</li> <li>Review of Change Consumer Information</li> <li>Review of Change Consumer Location</li> <li>Review Transaction Number Identifiers</li> <li>TOS discussion</li> <li>Review collision matrix</li> </ul>	

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