

# OEB GDAR EBT Standards Working Group

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## Minutes for Apr 10/11/12, 2006 – DRAFT

<b>ATTENDEES:</b> April 10, 2006 08:30am – 5:00pm	<b>ATTENDEES:</b> April 11, 2006 08:30am – 4:00pm	<b>ATTENDEES:</b> April 12, 2006 08:30am – 5:30pm
Darcy Hewgill Direct Energy	Darcy Hewgill Direct Energy	Darcy Hewgill Direct Energy
Karen Cooke Direct Energy	Karen Cooke Direct Energy	Karen Cooke Direct Energy
Avery Rhijnsburger Enbridge	Avery Rhijnsburger Enbridge	Avery Rhijnsburger Enbridge
Jason Munroe Enbridge	Jason Munroe Enbridge	Jason Munroe Enbridge
Katrina McWhirter Enbridge	Latif Nurani Energy Savings	Latif Nurani Energy Savings
Latif Nurani Energy Savings	Tom Stark ExtenSys	Rick Kathuria Energy Savings
Tom Stark ExtenSys	Loraine Baillargeon Kitchener Utilities	Tom Stark ExtenSys
Loraine Baillargeon Kitchener Utilities	Craig Pinfeld Direct Energy (phone)	Loraine Baillargeon Kitchener Utilities
Mark Van Praet Union Gas	Mark Van Praet Union Gas	Mark Van Praet Union Gas
Chris Ripley Union Gas	Patrick Boyer Union Gas (pm)	Patrick Boyer Union Gas (am)
Barb Robertson OEB	Barb Robertson OEB	Barb Robertson OEB
Scott Atkins SPi Group		

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ADMINISTRATION		
Item	Discussion	Action Items
1. Review Minutes from April 3/4 2006	<ul style="list-style-type: none"> <li>The minutes were accepted as is</li> </ul>	

ACTION ITEMS FROM PREVIOUS MEETINGS (IF APPLICABLE)		
Item	Discussion	Action Items
1. Matrix	<ul style="list-style-type: none"> <li>Mark updated collision matrix</li> <li>Matrix is considered final pending further comments</li> </ul>	

NEW BUSINESS		
Item	Discussion	Action Items & Prime
1. Historical Consumption (Part 1)	<ul style="list-style-type: none"> <li>Union and Kitchener will provide historical consumption for service premises</li> <li>Enbridge will check with Legal whether they can provide historical consumption for premises</li> <li>Prior to an Enrol, Kitchener requires the same information as an Enrol transaction for the historical consumption</li> <li>Reviewed Request IG</li> <li>Historical consumption will be provided based on billing period (to and from date)</li> <li>For consumers with no historical consumption, there would be consumption supplied, NULL would be returned or Normalized Monthly consumption would be included</li> </ul>	<ul style="list-style-type: none"> <li><b>Jason</b> will update historical consumption IGs</li> </ul>
2. Historical payment	<ul style="list-style-type: none"> <li><b>Barb</b> to add wording to EBT document suggesting a completion timeline for historical payment</li> </ul>	<ul style="list-style-type: none"> <li><b>Barb</b> to add wording to EBT document</li> </ul>

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3. Terminating transactions	<ul style="list-style-type: none"> <li>In the event a SA-TTR is submitted prior to the original transaction being accepted, the receiving party will accept the SA-TTR and terminate the original STR, citing the original transaction number in the response. The AA for the SA-TTR and the Accept/Reject for the STR will be generated in all cases (i.e. the original STR will not simply cease to exist).</li> </ul>	<ul style="list-style-type: none"> <li><b>Barb</b> to include wording to capture this in the Status Advice section of the Standard</li> </ul>
4. Price Point Create	<ul style="list-style-type: none"> <li>Reviewed IGs</li> <li>The price point create name must be unique for Enbridge</li> </ul>	<ul style="list-style-type: none"> <li><b>Avery</b> to update IGs</li> </ul>
5. Thresholds	<ul style="list-style-type: none"> <li>Vendors do not want to have thresholds for competitive gas services or for the Invoice Vendor Adjust</li> <li>Distributors prepared to draft thresholds for rate ready and vendor adjust, including expeditious change management process</li> </ul>	<ul style="list-style-type: none"> <li>No consensus can be reached by WG – will be escalated to Advisory Committee</li> </ul>
6. Price Point Change	<ul style="list-style-type: none"> <li>Reviewed IGs</li> </ul>	<ul style="list-style-type: none"> <li><b>Avery</b> to update IGs</li> </ul>
7. Status Advice	<ul style="list-style-type: none"> <li>Reviewed IG</li> </ul>	<ul style="list-style-type: none"> <li><b>Darcy</b> to update IG</li> </ul>
8. Vendor Adjust	<ul style="list-style-type: none"> <li>Reviewed IVA Discussion document prepared by Mark</li> <li>Parties agree to change EBT document to reflect Alternative #3 from the discussion document</li> <li>Vendor Adjustments will be flowed through the remittance process. Debit adjustments will not be held back.</li> <li>Direct would like to have the ability to provide explanatory text with the adjustment as an optional placeholder for possible future development. Distributors have indicated that they do not intend to include that functionality, so it will not be included in the IG at this time.</li> </ul>	<ul style="list-style-type: none"> <li><b>Barb</b> to update wording in EBT document</li> </ul>
9. Historical Consumption (part 2)	<ul style="list-style-type: none"> <li>Consumption will continue to be aggregated by the distributors as they do today. Historical data will be augmented to include the day of the month in which the account's current cycle indicates it is normally read. For Enbridge, the Large Volume Billing accounts bill either in the 1<sup>st</sup> half (cycle 7) or 2<sup>nd</sup> half (cycle 8) of the month. A proxy of the regular billing/meter read date in these cases will be determined and specified by Enbridge.</li> </ul>	<ul style="list-style-type: none"> <li><b>Jason</b> to update IG</li> </ul>

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<p>10. Invoice Rate Ready</p>	<ul style="list-style-type: none"> <li>• Some move scenarios, such as inter-delivery area overlap which potentially forces a cancel-rebill from D/P to system may also include a billed IVA transaction – what do we do with these?</li> <li>• EBP indicator has been added as an optional field.</li> <li>• Final billing indicator has been added as an optional field. It is being added at the Service Period level, so any Vendors that wish to derive final billing at the account level will need to derive that on their own.</li> <li>• Prior Period Adjustment indicator expanded to represent the period that is being adjusted, if applicable.</li> <li>• Vendor adjust is being moved up to the top “invoice” level instead of the price point level. Pool to pool proration can cause the adjustment to be reflected on one of the two pools.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Mark</b> to investigate inter-delivery move scenario and comment on the proposed outcome as clarification for the Standard. <b>Current assumption is that no IVAs will be cancelled even if the associated service period is cancelled and/or rebilled.</b></li> <li>• <b>Barb</b> to circulate IG for final review.</li> <li>• <b>Distributors</b> will determine which pool a vendor adjustment will be reported to and comment back to <b>Barb</b> for clarification in the Standard</li> </ul>
<p>11. IVA Bill Presentment</p>	<ul style="list-style-type: none"> <li>• There may be situations when an accepted IVA is not actually included on the consumer’s next bill, e.g. more than a maximum # of lines already for the billing month (Enbridge).</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Katrina</b> to investigate potential # of occurrence, maximum # of lines that will push to another bill.</li> <li>• <b>Avery</b> to determine a “bumped” IVA can be identified and trigger a rejection or termination – or can acceptance somehow assure that the IVA shows on the next bill.</li> </ul>

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12. Enrol conflicting with CCL	<ul style="list-style-type: none"> <li>• In the scenario in which:               <ul style="list-style-type: none"> <li>○ A consumer moves to unknown location triggering STR-TOS</li> <li>○ Consumer at their new location enrolls with a vendor (either their previous vendor or a new vendor)</li> <li>○ Consumer then contacts the utility to let them know they used to be at their original location, which would normally trigger a CCL to the original vendor</li> </ul> </li> <li>• In this scenario, the Enrol (active or pending) will be unaffected and the original vendor will not receive a back-dated STR-CCL</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Barb</b> will update Standard to reflect this process</li> </ul>
13. Invoice Remittance Statement	<ul style="list-style-type: none"> <li>• Reviewed by WG and changes made to both IRS IG and IRR IG as a result</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Barb</b> to circulate IGs for final review</li> </ul>
14. Funds Imbalance Statement	<ul style="list-style-type: none"> <li>• Reviewed by WG and minor changes made to IG</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Barb</b> to circulate IGs for final review</li> </ul>
15. Application Advice	<ul style="list-style-type: none"> <li>• Accept and Reject reviewed informally by read-through by Darcy.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Darcy</b> to forward IGs to <b>Barb</b> for circulation for final review</li> </ul>
16. Accept and Reject Schemas	<ul style="list-style-type: none"> <li>• Proposal from Latif that when XSD documents are developed that we only create one schema to capture both accepts and rejects for STRs and Application Advices.</li> </ul>	<ul style="list-style-type: none"> <li>• One XSD will be developed to capture both AAA and AAR, as well, one will be developed for FAA and FAR. <b>Mark</b> to let XSD developers know.</li> <li>• <b>Participants</b> to consider if one schema should also be used for all STR Accept/Rejects and discuss at the Apr 24<sup>th</sup> meeting</li> </ul>
17. XSD Development	<ul style="list-style-type: none"> <li>• Timetable for XSD development. Preference for FA schemas to be developed first.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Mark</b> to get schedule and forward to Barb</li> </ul>

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NEXT MEETING		
Item	Discussion	Lead
Logistics	<ul style="list-style-type: none"> <li>Dates/Times: Monday April 24, 2006 9:00 am</li> <li>Location: Offices of OEB, 2300 Yonge St., Toronto, <b>24<sup>th</sup> Floor room 24-02</b></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 EBT Standards changes</li> <li>Review IG final review comments</li> <li>Planning for remaining work</li> </ul>	