

OEB GDAR EBT Standards Working Group

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Minutes for Feb 28, Mar 1/2, 2006 – DRAFT

<p>ATTENDEES: February 28, 2006 11:00am – 5:00pm</p> <p>Darcy Hewgill Direct Energy (11am-3pm) Karen Cooke Direct Energy Avery Rhijnsburger Enbridge Kate Kelly Enbridge Jason Munroe Enbridge Rick Kathuria Energy Savings Latif Nurani Energy Savings Tom Stark Extensys Loraine Baillargeon Kitchener Utilities Mark Van Praet Union Gas Chris Ripley Union Gas Barb Robertson OEB</p>	<p>ATTENDEES: March 1, 2006 9:00am – 5:00pm</p> <p>Brenda Pinke Direct Energy (9am-1:15pm) Darcy Hewgill Direct Energy Karen Cooke Direct Energy Avery Rhijnsburger Enbridge Jason Munroe Enbridge Kate Kelly Enbridge Tom Stark Extensys (9am-11am) Rick Kathuria Energy Savings Nola Ruzyccki Energy Savings (9am-1:15pm) Loraine Baillargeon Kitchener Utilities Carol Hunt Kitchener Utilities (9am-12:00pm) Mark Van Praet Union Gas Chris Ripley Union Gas Russ Houldin OEB (1:30-5) Barb Robertson OEB</p>
<p>ATTENDEES: March 2, 2006 9:00am – 3:00pm</p> <p>Darcy Hewgill Direct Energy Karen Cooke Direct Energy Avery Rhijnsburger Enbridge Kate Kelly Enbridge Rick Kathuria Energy Savings Latif Nurani Energy Savings Nola Ruzyccki Energy Savings (1:00-3:00) 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 21/23	Minutes were accepted with minor changes which Barb will make and send out as final.	

ACTION ITEMS FROM PREVIOUS MEETINGS (IF APPLICABLE)		
Item	Discussion	Action Items
1. TOS Flows	<ul style="list-style-type: none"> Mark updated TOS document and flow. 	

NEW BUSINESS		
Item	Discussion	Action Items & Prime

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<p>1. Change Consumer Location</p>	<p><u>Overlap</u></p> <ul style="list-style-type: none"> • OESC has requested move overlap for a maximum of 90 days. (It is done to today in electricity but not in gas) • Enbridge said that they assign a direct purchase number to a customer/premise, so basically the idea of an overlap would require that the Utility assign the same direct purchase number to two premises. • The vendor would only be supplying gas at one location in the case of an overlap. • OESC is willing to live without the overlap providing the customer remains on the old address until the move out date. This is the case with Enbridge but Union performs the move on the move-in date and not the move out date. • DE waiting for direction from Legal. <p><u>Lag</u></p> <ul style="list-style-type: none"> • Vendors have requested that the distributors not send a CCL when they are notified of a consumer's move after the TOS effective date has passed. • Vendors would like to continue to be notified of new service/contact information for a consumer for a period of up to 60 days after the TOS effective date. • Kitchener and Union have validated with Legal that they are unable to provide us any information after a TOS effective date if we are not willing to automatically move the Customer by receiving a CCL within 60 days after the TOS effective date. • Given the legal outcome from Union, OESC has decided that they would prefer to have Union complete a post move after the TOS effective date. <p><u>Outside of Delivery Area within Franchise</u></p> <ul style="list-style-type: none"> • In order to complete the service order for the new location a price point and pool is required. If the vendor information is not available 7 days before the move in date for Union and 3 days for Enbridge, then the distributor will use system gas prices. • The CCL-Accept can not be used to communicate the new price and pool ID to the Distributor because if the info provided in the CCL-Accept is incorrect, the Distributor would not be able to reject the CCL-Accept. 	<ul style="list-style-type: none"> • All to go back and review legal and process concerns for a move overlap. • DE and OESC to meet and see if a unanimous decision can be made regarding receiving or not receiving a CCL after the TOS effective date. • Darcy to make changes to CCL and Barb will make changes to Enrol. • DE and OESC to meet and see if a unanimous decision can be made regarding what transaction will be used to provide the distributor with the pool and price ID in the case of an inter-delivery move. • Avery to continue investigation into obtaining an account number/unique identifier for the move-in location prior to the move in date.
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	<p><u>Outstanding Items:</u></p> <ul style="list-style-type: none">• Enbridge to investigate their ability to provide an account number for the move in location within the CCL. Vendors must be able to transact using the new account number.• WG discussed the idea of a Vendor sending a STR-CCL or a STR-CCI to the Distributor to notify them that a Customer is moving. This topic will be continued next week. <p><u>IG Changes</u></p> <ul style="list-style-type: none">• Move in billing address to be formatted like service address.• Move in billing address province should not be enumerated.• Consumer information the first name, middle name and last name fields to be increased to a field length of 100.	
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2. Definitions	<p><u>Status Advice (SA)</u> A status advice is used for an informational change in status/response to an originating STR transaction.</p> <p><u>Change Customer Information (CCI)</u> Is used to identify a change in Consumer information.</p>	
3. PIPE Reference Number and Transaction Reference Number	<ul style="list-style-type: none"> • The create date should reflect YYYYMMDDHHMMSS. • Agreement taken by all parties to reduce string to 30 digits. Will replace PIPE with P and TRAN with T. 	<ul style="list-style-type: none"> • Barb to fix typo and make changes. • All to review internally and advise Barb of any changes by next Wednesday March 8th.
4. Status Advice	<ul style="list-style-type: none"> • Group collectively agreed to the hybrid structure. • Current values and new values will be sent in a Status Advice. • The original transaction reference number for an NPS for the Current Vendor will be empty; therefore the original TRN will be optional on an SA. 	<ul style="list-style-type: none"> • Darcy to prepare a draft of the AAA and AAR.

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<p>5. TOS</p>	<ul style="list-style-type: none"> • The difference between a TOS and a DROP is that a DROP is ending the delivery arrangement between the consumer and Vendor but not with the Distributor. The TOS ends the delivery and gas competitive service with the consumer for both the Vendor and the Distributor at that location. • A TOS can result from direct contact with a consumer, or as a result of an indirect event (force out) or a result of LDC internal processes. • TOS termination reasons proposed are: <ul style="list-style-type: none"> ○ Move Out of Territory ○ Move Force Out ○ Move Undisclosed Location ○ Consumer Disconnect ○ Change of Account Ownership ○ Deceased ○ Credit Final • If forwarding billing address information is received from a consumer for a pending TOS, the distributor will forward the Vendor the updated information via STR-CCI up to and including the effective date of the TOS. • Inter-delivery Moves will be sent as a CCL and not a TOS. • The distributor will send us a TOS as soon as they learn of the termination regardless of the lead time. (Exception: TOS reason of credit final. We will be notified after the customer has been disconnected, as payment could be made up to the last minute.) <p><u>Review of TOS IG:</u> items identified below are common to the request, accept and reject transaction.</p> <ul style="list-style-type: none"> • PIPE Document Version will be enumerated. • Need to remove Vendor Consumer Account Number. • Forwarding Billing Address container in the billing address formatted tag the street name is missing from the Child elements. • A new Tag named Attention Line will be added in the billing address formatted container as the first tag. • The child elements for Billing Address Formatted will be updated to include Street Name and Attention Line. 	<ul style="list-style-type: none"> •
<p>6. Status of IGs</p>	<ul style="list-style-type: none"> • All WG participants are to review the TOS transactions internally and provide comments to Barb by March 15th. 	<ul style="list-style-type: none"> • All

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7. Working Schedule	<ul style="list-style-type: none"> WG will not meet the week of March 13th. Use the week to review the materials developed to date. WG schedule post March break. Proposal by Union to meet Monday and Tuesday each week. 	<ul style="list-style-type: none"> DE to reschedule project meetings.
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NEXT MEETING		
Item	Discussion	Lead
Logistics	<ul style="list-style-type: none"> Dates/Times: Wednesday March 8, 2006 – 9:00 am to 5:00 pm Thursday March 9, 2006 – 9:00 am to 3:00 pm Location: Offices of OEB, 2300 Yonge St., Toronto, 5th Floor “Baby Board Room” Conference Call Bridge 416-212-0400 Pass Code 6652# 	
Minute Taker	<ul style="list-style-type: none"> Enbridge 	
Agenda Items	<ul style="list-style-type: none"> Vendor’s decision on receiving CCL after TOS effective date. Vendor’s decision on Move Overlap. Review Change Consumer Location Accept and Reject IGs Review SA, AAA and AAR. Review of Change Consumer Information Vendor to Vendor Switch 	