



Your Special Edition
complimentary
use period has ended.
Thank you for using
PDF Complete.

Working Group

represent the views of the individuals participating in the working group only, and in no way reflect

[Click Here to upgrade to
Unlimited Pages and Expanded Features](#)

Minutes for May 1/2, 2006 DRAFT

ATTENDEES: May 1, 2006 09:00am 5:00pm		ATTENDEES: May 2, 2006 09:00am 5:00pm	
Darcy Hewgill	Direct Energy	Darcy Hewgill	Direct Energy
Karen Cooke	Direct Energy	Karen Cooke	Direct Energy
Avery Rhijnsburger	Enbridge	Avery Rhijnsburger	Enbridge
Jason Munroe	Enbridge	Jason Munroe	Enbridge
Katrina McWhirter	Enbridge	Katrina McWhirter	Enbridge
Kate Kelly	Enbridge	Kate Kelly	Enbridge
Latif Nurani	Energy Savings	Latif Nurani	Energy Savings
Tom Stark	ExtenSys	Tom Stark	ExtenSys
Loraine Baillargeon	Kitchener Utilities	Loraine Baillargeon	Kitchener Utilities
Mark Van Praet	Union Gas	Mark Van Praet	Union Gas
Barb Robertson	OEB	Chris Ripley	Union Gas
Scott Atkins	SPi Group	Barb Robertson	OEB
		Scott Atkins	Spi Group



Your Special Edition
complimentary
use period has ended.
Thank you for using
PDF Complete.

Working Group

represent the views of the individuals participating in the working group only, and in no way reflect

[Click Here to upgrade to Unlimited Pages and Expanded Features](#)

ADMINISTRATION

1. Review Minutes from April 24/25 2006	<ul style="list-style-type: none"> Historical Consumption – Enbridge and Union will not be able to differentiate between estimated and actual readings, and therefore will use the enumerated value “Billed”, and Null values will be replaced by values from a Standard Profile. 	Barb – to update IG's
---	--	------------------------------

ACTION ITEMS FROM PREVIOUS MEETINGS (IF APPLICABLE)

•		
•		

NEW BUSINESS

Working Group

[Click Here to upgrade to Unlimited Pages and Expanded Features](#)

represent the views of the individuals participating in the working group only, and in no way reflect

1. Historical Consumption	<ul style="list-style-type: none"> Enbridge will only be providing historical consumption for the customer and not the premise. Energy Savings asked related wording should be included in the EBT Standards. Barb agreed and will include wording. 	<ul style="list-style-type: none"> Barb to add wording to the EBT Standards.
2. IRS (Wholesale Charge Categories)	<ul style="list-style-type: none"> It was recommended by Union that Wholesale Charge Category be eliminated as the Wholesale Charge Type is provided. We will defer discussions until next week when we discuss the draft IRS statement that the utilities are preparing. Vendors would like to discuss a change management process for Wholesale Charge Types. It is proposed that if Utilities were to add a new Wholesale Charge Type they would inform Vendors by e-mail. 	<ul style="list-style-type: none"> All defer discussions until next week.
3. Combined Schemas	<ul style="list-style-type: none"> Discussions around combining the transaction set schemas into one. Last week it was agreed to do this for AA's and FA's. There was not agreement within the group that this could be applicable to the other IG's previously created with an accept and reject and therefore would remain as is. 	<ul style="list-style-type: none">
4. Milestones	<ul style="list-style-type: none"> Energy Savings – Energy Savings indicated that there is a high degree of risk associated with the current concept of Wave I and II testing for parties. There may not be enough opportunity to successfully test basic transactions. Energy Savings made a recommendation that prior to full end-to-end in Wave to be preceded by a month of basic transaction testing (Wave 0). The utilities indicated that this is added scope to the original Timeline – Workplan Schedule and changes utilities ability to meet the original milestones. The group accepted Barb's recommendation to leave the milestones as currently reflected, but then address these issues during the test plan discussions, and determine at that time the impact to milestones. 	<ul style="list-style-type: none"> All – defer discussion until Test Plan

<p>5. Milestones Item 17 and 19</p>	<ul style="list-style-type: none"> • Energy Savings – The Cutover milestones does not have a clear definition / clear exit criteria. Having an Implementation Date of February 1 may mislead parties into thinking they don't need to implement their systems until Feb 1. • The Timeline – Workplan Schedule to add additional wording to reflect the Cutover Plan (in Sept.06) will include dates as to when the “Vendors begin sending EBT Transactions” and “Distributors stop using web-based transactions.” • Update Timeline – Workplan Schedule - Item 17, Cutover Plan - add wording “includes dates when the LDC’s will stop accepting non-EBT transactions”. • Update Timeline – Workplan Schedule - Item 19, Cutover / Implementation - revise exit criteria to read “implementation of cut-over plan Item 17”. 	<ul style="list-style-type: none"> • Barb to update Timeline – Workplan Schedule and send to Brian H. and cc. to the working group.
<p>6. IG's and Schemas</p>	<ul style="list-style-type: none"> • How to keep in IG's and Schemas in sych? • IG's will be in one workbook • Barb has added a front sheet to track changes 	<ul style="list-style-type: none"> • Barb to maintain IG.
<p>7. CCL Request IG Comment Review</p>	<ul style="list-style-type: none"> • Reviewed Energy Savings comments. • One of the Billing Addresses (Formatted or Unformatted) must be mandatory. IG would reflect that it is conditional, if one is not filled out the other must be. • Move-In-Billing Address Formatted should have data type for Postal Code to be string, with length 10 (as could be in the US). • Move-In-Service Address Formatted should have data type for Postal Code should be ANAANA. 	<ul style="list-style-type: none"> • Barb to update IG.
<p>8. CCL Accept /Reject IG Comment Review</p>	<ul style="list-style-type: none"> • For all types of Rejects, if the Accept or Reject contains incorrect data ,then it will be managed outside of the EBT Standards (e.g. What if another Vendor sends an accept to another Vendors enroll). 	<ul style="list-style-type: none"> • Barb to update IG.

represent the views of the individuals participating in the working group only, and in no way reflect

9. CCL Accept /Reject IG Comment Review	<ul style="list-style-type: none"> Reviewed Energy Savings comments. What if the customer moves twice in a short period. The concept to NOT permit two pending CCL's was rejected by the group. What will Enbridge provide Vendors in this case? Union will send Vendors two CCLs with the old and new account number. Kitchener thinks they may be same as Union but will confirm. 	<ul style="list-style-type: none"> Enbridge and Kitchener to advise.
10. CCI Request Comment Review	<ul style="list-style-type: none"> Reviewed Energy Savings comments. Wording has already been added to the Standards reflecting that Distributors won't sit on transactions. No change required in the IG but Energy Savings to provide clarification of wording to be included in the EBT Standards as to how a refolio will be reflected in IG's. 	<ul style="list-style-type: none"> Energy Savings to provide wording for the EBT Standards
11. CCL	<ul style="list-style-type: none"> Union suggested to move the Move-In Distributor Account Number and related address information from the Account Information container and move them into the Change Consumer Request Location container. 	<ul style="list-style-type: none"> Barb to update IG
12. TOS Request	<ul style="list-style-type: none"> Reviewed Energy Savings comments. Union will send as a CCI with reason "Consumer Initiated". Enbridge will send a transfer from the one billing system to the other (CIS to LVB or vice versa) will be sent as a TOS followed by a ROS. Add to TOS request a new Termination Reason of "Change of Billing System". 	<ul style="list-style-type: none"> Barb to update IG
13. ROS Request	<ul style="list-style-type: none"> In the ROS remove the "Transaction Cross Reference Number" (which was the tag used to point to the TOS Request). Create a new tag "TOS Account Number" under the Reconnection of Service Request container and make it optional. Note: in Enbridge's case, Enbridge assigns the customer a new account number at the point the ROS is generated. It is conditional that it must be filled in if the account number is different from the TOS transaction. Also, after sending a ROS, Enbridge is to send a CCI, providing a complete set of information associated with ROS new account number. 	<ul style="list-style-type: none"> Barb to update IG and the EBT Standards

represent the views of the individuals participating in the working group only, and in no way reflect n.

14. Transfer Reject	<ul style="list-style-type: none"> Reviewed Energy Savings comments. Additional Information needs to be enumerated. The Reject Reasons (included in the Enrol Reject) relating to FT Turnback Rules needs to be included. Should be 0 or more. 	<ul style="list-style-type: none"> Barb to update IG.
15. Drop Reject	<ul style="list-style-type: none"> Reviewed Energy Savings comments. Remove Additional Information container. 	<ul style="list-style-type: none"> Barb to update IG.
16. Transfer Requests	<ul style="list-style-type: none"> Need to update EBT Standards (D-34) under rules to reflect that a vendor may submit a Transfer request with an effective date after the Pending Enrol effective date while an Enrol is Pending. 	<ul style="list-style-type: none"> Barb to update IG.
17. FA	<ul style="list-style-type: none"> Schema provides for the Time and Date stamp to be a 30 character free form text string. The recommendation is that it be changed to a standard XML format per W3C. No objections from group. 	<ul style="list-style-type: none"> All for everyone to consider.
18. Drop Request	<ul style="list-style-type: none"> Reviewed Kitchener's comments. Make recommended changes to correct Child Elements. Remove Additional information from Drop. 	<ul style="list-style-type: none"> Barb to update IG.
19. Transfer Request	<ul style="list-style-type: none"> Reviewed Kitchener's comments. Billing Method should be moved into the Pool Price Container . 	<ul style="list-style-type: none"> Barb to update IG.
20. Transfer Accept	<ul style="list-style-type: none"> Reviewed Kitchener's comments. Original Transaction Reference Number tag is to be added. Delete "Additional Information" tag Billing Method should be moved into the Pool Price Container. 	<ul style="list-style-type: none"> Barb to update IG.
21. Transfer Reject	<ul style="list-style-type: none"> Reviewed Kitchener's IG comments (referred to as Enrol Reject but meant Transfer Reject). Original Transaction Reference Number tag is to be added. Only on reject reason. 	<ul style="list-style-type: none"> Barb to update IG
22. Enrol Reject	<ul style="list-style-type: none"> List only the first reject reason is required to be provided. Therefore, in the Enrol Reject Container , the Reject Information container change reference of "1 or more" to mandatory (Line 37 and 40) 	<ul style="list-style-type: none"> Barb to update IG.



Your Special Edition
complimentary
use period has ended.
Thank you for using
PDF Complete.

Working Group

represent the views of the individuals participating in the working group only, and in no way reflect

[Click Here to upgrade to Unlimited Pages and Expanded Features](#)

23. Price Point Create Request /Accept / Reject	<ul style="list-style-type: none"> Reviewed Union IG Comments Move Distributor Pool ID to Price Point Info container 	<ul style="list-style-type: none"> Barb to update IG.
24. Price Point Create Request /Accept / Reject	<ul style="list-style-type: none"> Reviewed Union IG Comments Move Distributor Pool ID to Price Point Info container 	<ul style="list-style-type: none"> Barb to update IG.
25. Invoice Vendor Adjust	<ul style="list-style-type: none"> Reviewed Union IG Comments Update definition to disallow as an adjustment amount of 0.00 Sapient to figure out how to incorporate in schema 	<ul style="list-style-type: none"> Barb to update IG.
26. Historical Consumption Reject	<ul style="list-style-type: none"> Reviewed Union IG Comments As Reject Information Container has only one child element Reject Reason, eliminate Reject Information Container and move Reject Reason into Historical Consumption Reject container, 	<ul style="list-style-type: none"> Barb to update IG
27. Historical Consumption Accept	<ul style="list-style-type: none"> Reviewed Kitchener's IG comments. Kitchener requested that Consumption Detail – Scheduled Reading Date should be removed. Vendors felt a proxy for the reading date was preferential to receiving the cycle billing date as it would mean them having to manage 4 utility billing and reading schedules. In the case of Enbridge their LVB system has two cycles 7 and 8 and a reading date cannot be definitively derived, so a proxy date will be used by Enbridged. Barb will put some clarification around the Definition. 	<ul style="list-style-type: none"> Barb to update IG
28. Application Advice Accept	<ul style="list-style-type: none"> Reviewed Kitchener's IG comments. Add to PIP Transaction Type enumerated list (IRS, IVA and FIB) 	<ul style="list-style-type: none"> Barb to update IG
29. Application Advice Reject	<ul style="list-style-type: none"> Reviewed Kitchener's IG comments. There should be only one Reject Reason. 	<ul style="list-style-type: none"> Barb to update IG

<p>30. Price Point Create</p>	<ul style="list-style-type: none"> Reviewed Energy Savings comments Once the Price Point Create has been accepted, the Vendors can submit Enrols referencing that Price Point ID. Change all the Price tag field length for all Charge types to (9,7) and manage through the establishment of limits. But leave the definition to indicate unit of measure (e.g. \$/m3). Remove Phone Extension. Therefore Move the Phone Number element to the Bill Presentation Container and delete the Bill Presentation Phone container. The suggestion to merge Price Point Create and Price Point Change into one schema will be deferred until the schemas have been developed. 	<ul style="list-style-type: none"> Barb to update IG.
<p>31. Historical Consumption</p>	<ul style="list-style-type: none"> Reviewed Energy Saving comments. Child elements in the Account Information tag in the Historical Consumption Request. 	<ul style="list-style-type: none"> Barb to update IG.
<p>32. Status Advice</p>	<ul style="list-style-type: none"> Reviewed Energy Savings comments Replace SA Information with SA Reason and get rid of the SA Information bucket. The Update Information bucket should be "O or more" instead of "Optional". Make a notation in the Standard that if the date of the move out date CCL changes, we will get the a new move out date and the new effective date in the SA. The description for TTR Information tag / bucket should read "Terminate Transaction Request". We do not need the Effective Date tag in the SA TTR. In the Status Advice replace the TTR Information with the TTR Reason Tag. Delete the TTR Information container. 	<ul style="list-style-type: none"> Barb to update IG and EBT Standards.
<p>33. TOS</p>	<ul style="list-style-type: none"> Reviewed Energy Savings comments What will happen if a utility sends a TOS -Force Out but later determines that it should have been a TOS – Move Out of Territory? The Vendors want the TOS -Force Out terminated and a TOS – Move Out of Territory. The utilities will confirm what they will do. 	<ul style="list-style-type: none"> Kitchener, Union and Enbridge to confirm what they will do.

Working Group

[Click Here to upgrade to Unlimited Pages and Expanded Features](#)

represent the views of the individuals participating in the working group only, and in no way reflect n.

34. Milestones	<ul style="list-style-type: none"> Reviewed Enbridge comments on milestones forwarded by Barb on May 2, 2006. The Cutover Plan will include discussions as to when the first EBT transaction will start to be sent by Market Participants. 	<ul style="list-style-type: none">
35. Reject Reasons	<ul style="list-style-type: none"> Determined reject reasons that are associated with the Collision Matrix Next step to define them. 	<ul style="list-style-type: none">
36. Enrol Reject	<ul style="list-style-type: none"> Collision Matrix E1 and F1 contemplates an Enrol Reject with Additional Information providing the Drop effective date, so that the Vendor can resubmit. Need to add Additional Information to enumerated list "Drop Effective Date" 	<ul style="list-style-type: none"> Barb to update IG.
37. Invoice Remittance Statement	<ul style="list-style-type: none"> The Distributors would get together and develop a "standard" IRS and FIB IG's that would work for each utility and distribute to the WG ahead of time so that their respective finance groups could review. Also to provide an IRR and IRS example. Address the questions: "How are corrections to the IRS reflected?" and "How will GST be managed and presented?" The IG's would be discussed with group on Monday, May 8th. 	<ul style="list-style-type: none"> Distributors
38. Enrol Reject – Collision Matrix B1	<ul style="list-style-type: none"> Collision Matrix B1, in the Enrol Reject the utilities will not be providing in the Additional Information providing the pending Enrol effective date. 	<ul style="list-style-type: none">
39. Transfer – Collision Matrix K9	<ul style="list-style-type: none"> An incoming transfer with an earlier effective date to a pre-existing pending transfer will be rejected, as a SA UT should be used. An incoming transfer with the same effective date as a pre-existing pending transfer will be rejected, as a SA-UT should be used. A transfer with an effective date after a pre-existing pending transfer will be accepted. Collision Matrix K9 changed to Accept. 	<ul style="list-style-type: none"> Mark to update Collision Matrix Barb to add wording to EBT Standards.

Working Group

represent the views of the individuals participating in the working group only, and in no way reflect

[Click Here to upgrade to Unlimited Pages and Expanded Features](#)

40. TOS – Collision Matrix Q8 & 9	<ul style="list-style-type: none"> Change Collision Matrix Q8 & Q9 from Reject to Accept. The rationale is, if the TOS gets cancelled at a later date or if a ROS needs to be processed within 60 days of a TOS becoming effective, the utilities know the Pool and PPG ID the Vendor would like the customer to be associated to. 	<ul style="list-style-type: none"> Mark to update Collision Matrix.
41. EBT Standards Document	<ul style="list-style-type: none"> Barb will attempt to get out the next draft of the EBT Standards by next week. 	<ul style="list-style-type: none"> Barb to update EBT Standards
42. TOS	<ul style="list-style-type: none"> Union proposed “new” wording changes to the EBT Standards, to reflect that the 60 day period that the utilities will deem the contract relationship with the Vendor to remain in effect for competitive gas services, will commence the TOS effective date or the date the TOS is sent to the Vendor (in the case of retro TOS) whichever is later. A new TAG would need to be added to the TOS IG. All to check to see if it can be accommodated with the current scope in one week (May 8, 2006). 	<ul style="list-style-type: none"> Mark to propose some wording for the EBT Standards All to check to see if it can be accommodated with current scope
43. Price Change	<ul style="list-style-type: none"> Union to provide suggested “clarification” wording changes for inserting price changes and changing prices. Enbridge may be able to also accept price changes that precede a pending price change (as long as the lead time requirements are met). 	<ul style="list-style-type: none"> Mark to propose some wording for the EBT Standards
44. Proposed EBT Standards Wording Changes	<ul style="list-style-type: none"> In future if any WG member has proposed wording changes to the EBT Standards they are to submit them to Barb, and she will forward them to the WG group, and then a conference call will be scheduled for a future date. 	<ul style="list-style-type: none">
45. Adjustments	<ul style="list-style-type: none"> Enbridge currently sends billing adjustments when they are approved on the billing system. Enbridge to send an e-mail to Barb to forward to the Working Group. 	<ul style="list-style-type: none"> Avery R. to send a note of explanation
46. Point-to-Point Protocols	<ul style="list-style-type: none"> Barb to schedule the next Point-to-Point Protocols meeting. Proposed meeting date is May 15th @ 9:00 a.m. 	<ul style="list-style-type: none"> Barb to schedule
47.	<ul style="list-style-type: none"> 	<ul style="list-style-type: none">



Your Special Edition
complimentary
use period has ended.
Thank you for using
PDF Complete.

Working Group

represent the views of the individuals participating in the working group only, and in no way reflect

[Click Here to upgrade to Unlimited Pages and Expanded Features](#)

NEXT MEETING		
Logistics	<ul style="list-style-type: none"> Dates/Times: Monday May 8, 2006 9:00 am - 3:00 (Review all IRR, IRS, and FIB comments, Finance Representatives may want to attend) Date/Times: Tuesday May 29, 2006 9:00 am (Market Test Plan high level strategy) Location: Offices of OEB, 2300 Yonge St., Toronto, 24th Floor room 24-02 Conference Call Bridge 416-212-0400 Pass Code 6652# 	
Minute Taker	<ul style="list-style-type: none"> Energy Savings 	
Agenda Items	<ul style="list-style-type: none"> Review EBT Standards and IG comments from all parties Review rejects reasons from matrix review. Review milestone document Planning for remaining work 	