Appendix G - Historic Customer Usage Information

I.   Introduction

The NH EDI Working Group proposes the following business rules and electronic business transactions for providing customer usage history to competitive suppliers and brokers:

- The competitive supplier or electricity broker must obtain verification that the customer has affirmatively authorized the release of the customer's historic usage information to the supplier or electricity broker.

- A distribution company shall not share with any affiliate any proprietary customer information without the prior written authorization by the customer.

- Customer historic billing information will be released only to licensed competitive suppliers and electricity brokers.

- Historic usage data for customers that have been billed at least in part on a demand basis during the 36-month period prior to the release of information shall include, for the most recent 12 months, the energy consumption for each month and the highest demand level for each month. The distribution company shall indicate if any of the energy and demand measurements were not based on actual recorded usage.

- Historic usage data for customers that have been billed on an energy-only basis during the 36-month period prior to the release of information shall include the monthly energy consumption for the most recent 12 months. The distribution company shall indicate if any of the energy and demand measurements were not based on actual recorded usage.

II. Business Rules and Transaction Processing Guidelines

The transactions for requesting and providing customer history are designed to be consistent with the other Retail Access EDI transactions. The new transactions, which are shown in Sections IV and V of this appendix, will be transmitted according to the methods prescribed in the EDI Working Group Report and adopted by the NHPUC.

The Working Group recognizes that electricity brokers, unlike competitive suppliers, may not have the technical infrastructure prescribed by the EDI Report. These electricity brokers are encouraged to pursue one of the many available options: develop appropriate systems, partner with a supplier who has the necessary technical capability, access customer information as available on distribution company websites, or to negotiate bilateral arrangements with distribution companies in order to receive customer history by other means.

Prior to requesting customer history, competitive suppliers and electricity brokers must be licensed by the NHPUC. Competitive suppliers do not necessarily have to complete the comprehensive EDI testing that is required prior to enrolling customers in order to request and receive customer history information. In the case where a competitive supplier wishes to request and receive usage history prior to completion of full EDI testing, a simplified test to confirm the supplier's capability to use EDI to transmit a customer history request and receive the response will be required.

Each entity (competitive supplier or electricity broker) wishing to request and receive customer history data from a distribution company must enter into a trading partner agreement with the distribution company. For competitive suppliers, the same agreement that defines the other business relationship terms with a distribution company should cover these customer history transactions.

As it is the competitive supplier's responsibility, distribution companies will not authenticate that competitive suppliers have complied with the customer authorization requirements. The Working Group has applied the same procedure that is used for customer enrollment, which also requires that competitive suppliers obtain customer authorization. That is, distribution companies will release customer history to a licensed competitive supplier or electricity broker upon receipt of a valid request transaction (NH EDI Transaction #14) which includes the customer's distribution account number and portion of the customer's name based on the assumption that the competitive supplier would not know this information without prior authorization from the customer.

A request transaction (#14) must be submitted for each customer account for which information is desired.   The distribution company will not supply the history data without first receiving a valid request transaction.

All available history for each service associated with the customer account, covering up to one year, will be provided in a standardized format (see Transaction #15). For customers that have been billed on an energy-only basis during the 36-month period prior to the release of information, the historic information shall include the energy consumption for the most recent twelve months. For customers that have been billed at least in part on a demand basis during the 36-month period prior to the release of information, historic information shall include, for the most recent 12 months, the energy consumption and the highest demand level for each month.

If a customer account has multiple services, a separate history record will be provided for each type of service on the account. Note that the multiple service configuration does not apply to all distribution companies.

If a customer account has been active for less than a full year, the distribution company will provide all available history.

If a customer account has been active for more than one year, the distribution company will attempt to send the history covering the most recent twelve calendar months.

Each history item will indicate the type of reading used to determine the consumption (actual reading or estimate).

Each history item will reflect the total consumption as of the indicated reading date and since the previous reading date as available. In other words, the history provided will be contiguous and complete, so competitive suppliers will not have to extrapolate missing data or process extraneous data (i.e., billing adjustments).

The Working Group suggests that suppliers may use the following calculation to determine average monthly demand from the data included in the usage history response transaction:

Average Monthly Demand = Total Monthly KWh / (Days in Period X 24)

III.   EDI Transaction Details

Please refer to the EDI Implementation Guidelines for additional technical requirements pertaining to the translation of the Working Group data format to EDI transaction.

The valid value for the Detail Record Indicator on Transaction #14 and Transaction #15 is "H".

History detail fields in Transaction #15 are identified as "Conditional" because of customer count conditions that could result in any number of entries to cover one year of history.

The Supplier Account Number is optional on Transactions #14 and #15 because the supplier may or may not have already enrolled the customer. If the supplier includes the account number on the Request (transaction #14), the distribution company will return the same account number (without any validation) on the Customer History (transaction #15).

Valid values for the Type of Reading in Transaction #15 are "A" (for actual) and "E" (for estimated).

The following Completion Codes could be returned on an EDI Error Record (Transaction #6) in response to a Transaction #14:

103   Invalid customer account or account not active
104   Invalid customer name
153   Invalid supplier id (indicates the Distribution Company does not recognize Supplier or Broker)
178   Customer has not billed - no history available

IV.   *EDI Data – Format I: Administrative Transactions*

	Format I - REQUEST CUSTOMER HISTORY (Transaction #14)			
	From Supplier or Broker to Distribution Company			
	DESCRIPTION	**REQ**	**SIZE**	**TYPE**
1)	Detail Record indicator ("H")	MA	1	A/N
2)	Supplier account number	OP	20	A/N
3)	Distribution Company account number	MA	20	A/N
4)	Distribution Company Customer name	MA	4	A/N
5)	Effective date of service and load requirements	N/A		
6)	Billing option for the account - Pass Through or Complete	N/A		
7)	Distribution Company rate code	N/A		
8)	Supplier Rate Code	N/A		
9)	Supplier pricing structure maintained by Distribution Company	N/A		
10)	Type of service indicator	N/A		
11)	Service identifier	N/A		
12)	Completion status	N/A		
13)	Billing cycle	N/A		
14)	Indication of applicability of Sales Tax	N/A		
15)	Off Cycle Reading Indicator	N/A		
16)	Off Cycle Reading Date	N/A		
17)	New Distribution Company account number	N/A		
18)	New Distribution Company Customer name	N/A		
19)	New Distribution Company service identifier	N/A		
20)	Customer's Bill to Address Line 1	N/A		
21)	Customer's Bill to Address Line 2	N/A		
22)	Customer's Bill to Address City	N/A		
23)	Customer's Bill to Address State	N/A		
24)	Customer's Bill to Postal Code	N/A		
25)	Customer's Bill to Country Code	N/A		
26)	Special Use Code (Public Aggregator)	N/A		
	LEGEND			
	MA = Mandatory OP = Optional N/A = Not Applicable for this Transaction DATE = CCYYMMDD A/N = Alphanumeric			

V. EDI Data – Format VI: Customer Usage History

From Distribution Company to Supplier or Electricity Broker

DESCRIPTION	SIZE	TYPE
1) Detail Record Indicator	1	A/N
2) Supplier Account Number	20	A/N
3) Distribution Company Account Number	20	A/N
4) Distribution Company Customer Name	4	A/N
5) Distribution Company Rate	5	A/N
6) Type of Service	1	A/N
7) History Fields (repeat as required to span up to one year)		
7a) Date of Reading (Defines End of Bill Period)	8	Date
7b) Date of Previous Reading (Defines Beginning of Bill Period)	8	Date
7c) Type of Reading (Actual or Estimated)	1	A/N
7d) Total KWh Usage for this Period	9	N0
7e) Actual (Peak KW) Demand for this Period	6	N1

Legend: DATE = CCYYMMDD   A/N = Alpha/Numeric   Nx = Numeric data with implied decimal point where "x" indicates the number of places to the right of the decimal position

	Format VI - CUSTOMER USAGE HISTORY (Transaction #15)			
	From Distribution Company to Supplier in response to a valid request for Customer History (Transaction #14)			
	DESCRIPTION	**REQ**	**SIZE**	**TYPE**
1)	Detail Record indicator ("H")	MA	1	A/N
2)	Supplier account number	CO	20	A/N
3)	Distribution Company account number	MA	20	A/N
4)	Distribution Company Customer name	MA	4	A/N
5)	Distribution Company Rate	OP	5	A/N
6)	Type of Service	MA	1	A/N
******	*History (fields 7a through 7e repeat as required to span up to one year)*			
7a)	Date of Reading (Defines End of Bill Period)	CO	8	Date
7b)	Date of Previous Reading (Defines Beginning of Bill Period)	CO	8	Date
7c)	Type of Reading (Actual or Estimate)	CO	1	A/N
7d)	Total KWh Usage for this Bill Period	CO	9	N0
7e)	Actual (Peak KW) Demand for this Bill Period	CO	6	N1
	LEGEND			
	MA = Mandatory OP = Optional N/A = Not Applicable for this Transaction CO = Conditional based on available history DATE = CCYYMMDD A/N = Alphanumeric			