

**Minutes – In Person Meeting
Massachusetts Electronic Business Transaction Working Group
October 4, 2013**

Attendee	Company
Juliana C. Griffiths, Utility Co-Chair	National Grid
Monica Neibert, Supplier Co-Chair	ESG
Chrissy DeLoughrey	ESG
Candace Cox	Direct Energy
Thomas R. Dougherty	Ista North America
Joan Jerz	National Grid
Pyong Bruce Kim	NSTAR
Joel Andruski	Unitil
Alex DeLa Rosa	GDF Suez
Grant Serna	GDF Suez
Kimberly A. Wall	PPL Solutions
Barbara Goubeaud	EC Infosystems Inc
Nick Mervosh	EC Infosystems Inc.
Suzanne E. Clark	Liberty Power
Pat Reno	TransCanada
Eduardo Aguayo	Con Ed Solutions
Steve Pitcher	Mint Energy
Nancy C. Kulina	Dominion
Johan Wassam	Provider Power
Bill Caffall	Dominion Retail
Matt Sigg	Constellation
Katherine B. Provencher	WMECO
William S. Oravec	WMECO
Michael C. Viccaro	WMECO
Alexandra I. Fonseca	WMECO
Karen H. Callahan	WMECO
Daryush Donyavi	WMECO

1. POR – A technical session at the Massachusetts Department of Public Utilities is being held on Tuesday, October 8, 2013. Settlement talks between the utilities and suppliers continue.
2. Co-Chair Monica Neibert discussed the change form for POR, including a discussion regarding adjustment codes, cancels, and frequency of 820's was discussed. The utilities offered the information below on Supplier payments:

Utility	Method	Frequency
NSTAR	EDI	Does Not Know
WMECO	Spreadsheet	Monthly
National Grid	EDI	Daily Payments – 20 Days
Unitil	Spreadsheet	Does Not Know

3. Credits to customers were discussed. Credit balances with customers need to be handled electronically on the single bill option not to cause double credits and/or refunds to customers.

4. The Suppliers requested information whether or not the option for an additional line item on the single bill model was an option. Here are the results:

Utility	Response
NSTAR	Will research
WMECO	No Capability at this time.
National Grid	Estimate of \$39,000 to add an additional line
Unitil	Moving to another Billing System in 18-24 Months

5. Seamless moves: Tom Dougherty – ISTA posed the question on how seamless moves work in Massachusetts. If the customer moves with the same service territory, does the customer keep their supplier, same rate, contract? Pat Reno from TransCanada added inquiry on how works with Zones, Service Territories, Different Facilities with Different Loads? She prefers a drop/re-enroll.

Utility	Response
NSTAR	
WMECO	Clean move; you will get a drop on the old location and a move with the new address and then a change. New account number. If same day move which is typically the case for residential. If there is overlap of service it is a manual process for WMECO.
National Grid	A customer that moves within a distribution company's service territory shall have the opportunity to notify the distribution company that they seek to continue service with the customer's existing competitive supplier, normally on a phone call with the customer representative. The enrollment would most likely be done manually; a manually enrolled account does not receive an EDI transaction.
Unitil	

6. Sales Tax: An issue was brought up by a Supplier – if a customer has not provided a MA State Tax Exempt form to the Supplier, the Supplier requested that the utilities continue to charge the customer sales tax. In this scenario, the utility would have received a tax form from the customer and will not charge sales tax. The problem is that the Suppliers are required to retain Sales Tax Exempt Forms on file. It is the customer's responsibility to provide this form to the Supplier.