

MA EBT Minutes
10/17/19

Attendees in person: NGRID, , , Customized, Constellation, EC Info, Big Data, Agera, Direct, Starion, Engie, Hansen, IGS, Marketwise, Just Energy, NRG Unitil Liberty Utilities ESG

1. Roll Call
2. Approve Meeting Minutes – June revised and August. Approved
3. Change Control Updates:
 - a) 029 – REFQY revision – In progress
 - b) 031 – Eversource adding REF*BF to 867H and 814H – 867H implemented 7/23. 814 ETA end of year
 - c) TBD – A13 Code update – in progress
4. NGRID Update on 814C issues:
 - a) Invalid REF02: NM1MR (TBD) – clarification needed on issues experienced.
5. Tax Exemption Percentage:
Old minutes from 2018 had the information below the table. Please update the table for the current practices.

Utility	Tax Exemption (AMT*T/DP) Required on Enrollment, Price Change, Bill Option Change to Rate Ready?	Supplier or Utility Tax Exemption Percentage Used	814 Enrollment Response includes (utility or supplier’s tax exemption identifier)
Eversource East (Boston Edison, Commonwealth, Cambridge)			
Eversource West (WMECO)			
Fitchburg Electric			
National Grid (MECO/Nantucket)			

Minutes from October 2018

- a. Eversource West: Echoes in EDI but not reflective of what system has. Eversource sends sales tax in POR FAMP
- b. Eversource East does use what the Supplier sends via EDI
- c. NGRID: not in EDI (between supplier and customer). Customer onus to notify supplier. NGRID reviewing.
- d. UI collects and remits to state.

- e. Unitil: echoes back but no validity. Will not change their systems based of EDI from supplier.
- f. Liberty: Monica emailed but NH is going 100% exempt.
- g. Eversource North: going 100% exempt as of Jan 2019 for all customer classes

Minutes from August 2019

- Based on discussions there push for LDCs to send on enroll responses what they have in their systems as well as change a 814C if it changes. This would serve as Alert to supplier to reach out to customer to obtain tax exemption certificate.
- Direct pointed out that customers get confused why the need to provide twice.
- Eversource East enrolls as taxable and then will change to exempt once proof received. Works as desired via EDI. Will reject if not sent on request.
- Eversource West has IT ticket open to operate similar to East. Supplier responsible for refunding Taxes to customer. Will they reject if not sent on request? To test

Today's Discussion

- Utilities to complete above table and documentation added to IGs.
- Direct has trouble with exemptions since NGRID maintains separately. A customer tells supplier they are not exempt but utility is not billing taxes. Suppliers are liable for the charge.
- Mark Hanks – Direct Regulatory proposed forming a working group to summarize issue and draft straw proposal for distribution. Next step would be delivering to DPU.
- NGRID met with their Tax Department and they are firm that it is the customer's responsibility to provide exemption evidence to suppliers.

What is the concern with sharing status with supplier?

1. Exemption Forms
2. Privacy

6. K2 (kVAR) vs. K4 (kVA)

- Any utilities who are still using "K2" instead of "K4" need to report progress on correcting the value.
 - a) Eversource East is correcting in progress
 - b) NGRID uses K2, should change to K4 KVA – Request under review, pending approval
- Eversource (CLP, PSNH, WMECO) is resolved. CC 030
- Narragansett in Rhode Island still sending K2, did not find any other examples.
- Liberty updating by end of October..

7. Excess Generation - Each utility to answer:

- Does the utility 'bank' excess generation and apply the kWh to a future period?
 - Example, customer has more generation than usage in Jan and Feb, they have more usage in Mar, do they get a credit from Jan/Feb Excess?
 - FGE/ Unitil - No Credit
 - Eversource West - Does not bank (net zero)
 - Eversource East - No bank
 - NGRID - Takeaway
 - Liberty - Do net out, bank for customers with net meter after 8/17. Cash out.
 - Cash out annually - March/april annually excess of 600 kwh

Above is from supplier side. What occurs on Utility side?

- Liberty and MA LDCs cash out monthly

Where are practices documented? Net Meter Agreement or Tariff?

- Eversource East – tariff possibly
- State Regulations/Rules:
Per Liberty - NH PUC Order regarding Net metered customers as result of a House Bill 1116
<https://www.puc.nh.gov/Regulatory/Orders/2017orders/26029e.pdf>

- Does the utility send the usage to the supplier as a net value?
Example, if customer has 600 kWh consumed, and 100 kWh generated, do you send 600 or 500 in the 810?
 - FGE/Unitil - 500kwh
- What does the 810 look like for a net metered customer that has excess generation (e.g., does utility send 0)?
 - All utilities will send an 810 for 0kwh.

8. Next meeting: Wednesday 12/18 at 11am

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