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AEP Ohio CRES Provider Workshop 2021

Welcome!



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Agenda

- Welcome
- Housekeeping
- Introductions
- Annual CAP & TRAN
- Government Aggregations
- EDI/Choice Projects Implemented 2021
- BOLT Enhancements
- Ohio Regulatory Updates
- LOAs – Letters Of Authorizations
- Open Discussion and Q&A
 - CRES Registration process/issues; BPP - Business Partner Portal and other topics of interest to the participants

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Housekeeping

-
- Cameras will be activated for AEP participants only
 - Participant phones will be muted at the start of the workshop
 - Chat conversation will be activated and monitored
 - Questions will be taken along the way via the chat feature, but lengthy discussions will be saved for the end of the workshop
 - Separate, follow up discussions outside of the workshop may be scheduled, if needed

We are new users of MS Teams, so we appreciate your patience as we work through new functionality!

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Customer Choice Processes & Systems Team

Michele Jeunelot (MJ), Manager

Team:

- ❑ Debra Foster, Functional System Architect Principal - *Corpus Christi, Texas*
- ❑ Kevin Vass, Customer Account Manager, Sr. – *South Point, Ohio*
- ❑ Stephanie Lepore, Functional System Architect Sr. – *Columbus, Ohio*
- ❑ Doug Hinkle, supervisor – *Columbus, Ohio*
- ❑ Bob Hewitt, supervisor – *Gahanna, Ohio*

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Customer Choice Processes & Systems Team

Doug Hinkle, Supervisor

Team:

- Heather Brumfield, Functional System Architect Principal – *Columbus, Ohio*
- Grant Kemmerer, Customer Account Manager, Sr. – *Columbus, Ohio*
- Pam Ramey, Functional System Analyst – *Abilene, Texas*
- Samantha Perez, Functional System Analyst – *Corpus Christi, Texas*
- Shawnte' Kennedy, Functional System Analyst – *Columbus, Ohio*

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Customer Choice Processes & Systems Team

Robert (Bob) Hewitt, Supervisor

Team:

- ❑ Anita Adams, Market Specialist - *Gahanna, Ohio*
- ❑ Carol Miles, CRES Market Coordinator – *Gahanna, Ohio*
- ❑ Tammy Byrd, Provider Support Associate – *Gahanna, Ohio*
- ❑ Shawn Frazier, Functional System Analyst – *Gahanna, Ohio*
- ❑ Kelsey Roessler, Functional System Analyst – *Gahanna, Ohio*

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Annual Capacity and Transmission Tags

❑ Annual CAP & TRAN Process

❑ Mid December: Release of Future New values

❑ 814C EDI to Provider of Record on SDI at that time

❑ BPP available by SDI look up

❑ TRAN/NSPL/1CP effective January 1st 2022 – December 31st 2022

❑ CAP/PLC/5CP effective June 1st 2022 – May 31st 2023



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Governmental Aggregation Updates

Tamara Byrd

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Aggregation Codes

- For customers enrolled in a government aggregation, please insure you send the **REF|PG|GAG|GXYZ** segments within your EDI 814 Enrollment
- Utilize the assigned government aggregation code for the respective municipality
- AEP Ohio accepts 814 Change transactions with government aggregation code updates if you've missed it on the enrollment

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Aggregation Codes

- After a premise list is emailed to the primary contact, an email is sent with the aggregation code (GAGG Code) for that municipality. It is of the utmost importance to include that code on **ALL ENROLLMENTS ASSOCIATED WITH THAT AGGREGATION.**

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Conclusion

In order to get the most accurate information, it is important to:

1. Complete the application correctly and in its entirety
2. Be sure to include the aggregation code (GAGG Code) on all enrollments associated with the aggregation
3. Make requests in plenty of time as to not rush the process

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Projects Implemented - 2021

Doug Hinkle

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Change Control 175

- Allows CRES to alert EDU when customer has agreed to a net metering contract with the CRES
- Providers can send 'CNM' (CRES Net Metering) & 'NCNM' (Not CRES Net Metering) REF02 codes
- Example: *REF*PID*CNM*
- Used in 814E and 814C transactions
- Implemented **Friday October 15, 2021**



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Change Control 179

- Add PTD*BB loop to 867 MU/IU transactions
- BB loop includes billed kWh & kW (if applicable) values
- Implemented **Friday August 20, 2021**

PTD|BB
DTM|150|20210824
DTM|151|20210922
QTY|D1|3240|K1
QTY|D1|968472|KH

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Change Controls 176 & 177

- Highlights supplier messages on customer invoices
- Expanded number of bill messages from 5 to 6 lines maximum.
- Highlighting utilized with '@@@'
- Allowed bill messages for provider changes to the rates, terms and/or conditions on Rate Ready customers using the 814C transaction
- Messages appear in the Supplier Message(s) section of invoice
- Implemented **Friday February 26, 2021**

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Want to get future notifications?

- Join the Ohio EDI Working Group Listserve

To signup, send a message to subscribe-ohioedi@list.em.ohio.gov. You should receive a message confirming that you are subscribed to the list. Messages sent by the listserv are from the "list.em.ohio.gov" domain, so please make sure that messages from this domain are not blocked on your mail service.

We're unable to perform this for you as the message needs to come from your email address. 😊

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Questions?

Doug Hinkle

drhinkle@aep.com

614-369-2826

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BOLT Enhancements

BOLT is the authentication and authorization to access AEP's Business Partner Portal (BPP) – Access only to CRES Brokers

Enhancements

- Employee User Search within BOLT
 - Search Email/Username currently existing within BOLT
- View Employee Details
 - View creation, password expiration, group access
- New User Email generated Access Link
 - Email includes link to directly access User's iForgot Account
- Reset Account (User's iForgot Account)
 - When unable to answer security questions to access iForgot Account



AEP Ohio Regulatory Updates

Rich Williamson, Regulatory Pricing & Analysis Manager

2020 Base Rate Case Update (Case No. 20-0585-EL-AIR)

- Base case stipulation filed March 12, 2021
- Hearings took place May 12-18, 2021
- Initial briefs filed on June 14, 2021 and reply briefs were filed July 6, 2021
- Anticipate order in 4th quarter 2021

gridSMART Phase III (Case No. 19-1475-EL-RDR)

- AEP Ohio filed an unopposed settlement agreement in the gridSMART Phase III case on October 27, 2021.
- AEP Ohio will invest \$245M of capital over 7 years and recover associated \$87M of O&M
- Settlement allows for installation of the remaining 475,000 AMI and additional investments in Volt Var Optimization and Phase II Distribution Automation Circuit Reconfiguration (DACR) tie line work.
- Incremental DACR withdrawn from this proposal but will file a separate DACR filing no later than June 2022.

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Letter of Authorization (LOA) Refresher

Tamara Byrd

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How the changes come about?

- Suppliers discussed having a standardized LOA during a Market Development Working Group meeting
- After weeks of discussion, PUCO staff adopted a new LOA which was ready for use in early 2016
- All EDUs in Ohio use this LOA



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Non IDR LOA



A unit of American Electric Power

Ohio Customer Letter of Authorization For Release of Customer's Electric Utility Account Number/SDI and/or Historical Interval Data

Customer Name: _____
Customer Address: _____
City, State, Zip: _____ Phone Number: _____
Authorized Person/Title: _____
Account/SDI Number: _____ For multiple account/ SDI Numbers, please
attach spreadsheet in Microsoft Excel format containing the accounts/SDI(s) for which you are requesting
usage.

Competitive Retail Electric Service (CRES) Provider (Includes Brokers, Power Marketers)

CRES Name: _____
Address: _____ Phone Number: _____
Email: _____

Initial box for release of specific account information to CRES Provider listed above:

Account/SDI Number Release: The above named customer authorizes the release of their Account Number/Service Delivery Identification Number. This information is to be used for one or all of the following: enrollment in a product or service; and/or obtaining usage data for pricing of a product or service.

Residential, Interval Historical Energy Usage Data Release:

The above named residential customer authorizes the release of up to 24 months of _____ kwh data, if available. (Please fill in the blank with your request, e.g., Hourly, 30-minute, 15-minute, etc.) This information is to be used for pricing of a product or service.

I realize that under the rules and regulations of the Public Utilities Commission of Ohio, I may refuse to allow AEP Ohio to release the information set forth above. By my signature, I freely give AEP Ohio permission to release the information designated above.

Signature _____ Date _____

Expiration Date: _____, or this authorization will expire one year from the date of the customer signature, whichever is sooner. Rev. 05-10-2016

Two LOAs

IDR LOA



A unit of American Electric Power

Ohio Customer Letter of Authorization For Release of Customer's Electric Utility Account Number/SDI and/or Non-Residential Historical Interval Data

Customer Name: _____
Customer Address: _____
City, State, Zip: _____ Phone Number: _____
Authorized Person/Title: _____
Account/SDI Number: _____ For multiple account/ SDI Numbers, please
attach spreadsheet in Microsoft Excel format containing the accounts/SDI(s) for which you are requesting
usage.

Competitive Retail Electric Service (CRES) Provider (Includes Brokers, Power Marketers)

CRES Name: _____
Address: _____ Phone Number: _____
Email: _____

Initial box for release of specific account information to CRES Provider listed above:

Account/SDI Number Release: The above named customer authorizes the release of their Account Number/Service Delivery Identification Number. This information is to be used for one or all of the following: enrollment in a product or service; and/or obtaining usage data for pricing of a product or service.

Interval Historical Energy Usage Data Release:

The above named customer authorizes the release of up to 12 months of _____ kwh data, if available. (Please fill in the blank with your request, e.g., Summary, IDR, Cap/Tran, Hourly, 30-minute, 15-minute, etc.) Broker/CRES agrees to \$50 charge per SDI, if applicable. This information is to be used for pricing of a product or service.

I realize that under the rules and regulations of the Public Utilities Commission of Ohio, I may refuse to allow AEP Ohio to release the information set forth above. By my signature, I freely give AEP Ohio permission to release the information designated above.

Signature _____ Date _____

Expiration Date: _____, or this authorization will expire one year from the date of the customer signature, whichever is sooner. Rev. 05-10-2016

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[AEP Ohio Historical Usage Requests-LOA](#)



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Two LOAs

Similarities:

- The customer information section
- The CRES/Brokers section
- Customer signature section

Customer Name: _____
Customer Address: _____
City, State, Zip: _____ Phone Number: _____
Authorized Person/Title: _____
Account/SDI Number: _____ For multiple account/ SDI Numbers, please
attach spreadsheet in Microsoft Excel format containing the accounts/SDI(s) for which you are requesting
usage.

Competitive Retail Electric Service (CRES) Provider (Includes Brokers, Power Marketers)

CRES Name: _____
Address: _____ Phone Number: _____
Email: _____



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Two LOAs

- Differences:

Residential, Interval Historical Energy Usage Data Release:

The above named residential customer authorizes the release of up to 24 months of _____ kwh data, if available. **(Please fill in the blank with your request, e.g., Hourly, 30-minute, 15-minute, etc.)** This information is to be used for pricing of a product or service.

Interval Historical Energy Usage Data Release:

The above named customer authorizes the release of up to 12 months of _____ kwh data, if available. **(Please fill in the blank with your request, e.g., Summary, IDR, Cap/Tran, Hourly, 30-minute, 15-minute, etc.)** **Broker/CRES agrees to \$50 charge per SDI, if applicable.** This information is to be used for pricing of a product or service.

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Usage Release Box

- The usage release box must have the authorized person's initials. Per the PUCO, we will not accept check marks or "Xs"

Initial box for release of account information. Provider listed above:

Account Information Release: The above named customer authorizes the release of their Account Number, Service Delivery Identification Number, and other information is to be used for one or all of the following: enrollment in a service; and obtaining usage data for pricing of a product or service.

Interval Historical Energy Usage: The above named customer authorizes the release of _____ months of _____ kwh data, if available. (Please fill in _____, Summary, IDR, Cap/Tran, Hourly, 30-minute, 15-minute, etc.) _____ charge per SDI, if applicable. This information is to be used for pricing _____ product or service.

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IDR Data Request

Account/SDI Number Release: The above named customer authorizes the release of their Account Number/Service Delivery Identification Number. This information is to be used for one or all of the following: enrollment in a product or service; and/or obtaining usage data for pricing of a product or service.

TAAS **Interval Historical Energy Usage Data Release:**
The above named customer authorizes the release of up to 12 months of _____ kwh data, if available. **(Please fill in the blank with your request, e.g., Summary, IDR, Cap/Tran, Hourly, 30-minute, 15-minute, etc.)** Broker/CRES agrees to \$50 charge per SDI, if applicable. This information is to be used for pricing of a product or service.

- The Account/SDI Number release section is to provide the account/SDI number only. Most of you have that when you contact AEP Ohio for usage
- The Interval Historical Energy Usage Data Release is what the majority of requests are for. The customer should initial this box and **FILL IN THE BLANK** with the data you are requesting
- Our Business Partner Portal (BPP) is available for you to receive the IDR & Summary data free of charge, 24/7



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LOA Audits

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- With the PUCO's direction, we are required to complete audits to confirm LOAs are received and completed properly
 - If the LOA is not completed correctly, access to the portal will be suspended

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LOA Audits

- 1st failed audit - suspension from BPP for 30 days
- 2nd failed audit - suspension from BPP for 90 days
- 3rd failed audit and any further failures - suspension from BPP for 1 year

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Helpful Tips

- The LOA must be completed in its entirety including the CRES/Broker section
- The **customer** must **initial** the usage release boxes **not** someone from the CRES and/or Broker (third party)
- BPP is free - 24/7 for summary and IDR data
- We try to respond to all requests within three business days
- To minimize errors, please be sure to include multiple SDI numbers on an MS Excel spreadsheet and send along with the LOA
- To protect the customer and the integrity of the document, AEP Ohio reserves the right to reject any LOA on which the customer's fillable information appears to be altered

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Q & A

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