

From: Alston, Rick

Sent: Friday, April 16, 2004 2:21 PM

To: 'George Behr'

Cc: Andria Yelverton (E-mail); Annunciata Marino (E-mail); Barb Fatina (E-mail); Barbara Alexander (E-mail); Barbara Wise (E-mail); Bill Barkas (E-mail); Bill Newbold (E-mail); Blake Gross (E-mail); Brenda Shaw (E-mail); Carol Waterbury (E-mail); Christopher Burden (E-mail); Dale Davis (E-mail); Dan Jones (E-mail); Dan Rothfuss (E-mail); Derek Mauzy (E-mail); Dorman Davis (E-mail); Eric Wilen (E-mail); Gail Higashi (E-mail); George Behr (E-mail); Jean Mason (E-mail); Jim Minneman (E-mail); Judy Ray (E-mail); Kathleen Yetman (E-mail); Ken Thiry (E-mail); Les Nishida (E-mail); Lisa Robert (E-mail); Marcy McCain (E-mail); Mary Edwards (E-mail); Michael Garrett (E-mail); Mike Coyle (E-mail); Patrick Eynon (E-mail); Rick Zollars (E-mail); Ruth Kiselewich (E-mail); Tan Adams (E-mail); Tom Kilgore (E-mail); Tom Ringenbach (E-mail); Tom Rone (E-mail); William J. Wolf (E-mail); Yvette Camp (E-mail)

Subject: RE: SPT input for cons bill ready
George, here are my thoughts:

- Remove #2: Cust info is kept by bill party. I'm OK with removing this element, but how do we account for the fact that some jurisdiction(s) may use it? Virginia uses it now; although it's usage is Optional. Need a business rule to stipulate that the Billing Party will get it via enrollment/customer information process and then be held responsible to place it on the bill as it is a number assigned by and meaningful to the customer.
- #3 and 4: We have both bill party acct num and SDID. Most markets use either/or as unique ID. I suggest we change the name of that data element to reflect that (how about 'market account identifier'). A very good idea since that number is not used for programming purposes.
- remove #6: Serv addr is maintained by bill party. OK, by me.
- #7: Disco prev addr is only used in supplier cons bill ready. need that in notes somewhere. It is used for Disco. Cons. Billing in Virginia [REF01=45].
- Remove #8, 9, 22, 39, 40: Budg bill (BB) and payment plan (PP) are not explicitly supported in this transaction. Basically in bill ready, each party maintains that information in their systems. The non-billing party's charges should reflect net result of BB/PP, and my have a charge with that annotation. That's how it works today in all bill-ready markets. To change that would be very complex (we did consider changing in PA and aborted). I defer to Ameren because I think that Illinois is the jurisdiction that makes use of these elements in bill ready.
- Remove #25 thru 33: No balance, BB or PP info passed in Cons BR invoice. Ditto
- Remove #41, 42, 43, 44: Late pay and Misc charges are simply another type of charge. no need for add'l data elements. The SPT is a checklist of items to communicate to the Billing Party, so I think it should stay. However, in the Data Dictionary, we could list it as a code value on a new element such as Current Charge Type where all the SAC codes that codify the types of charges would reside. If we do that, then all charges would have a code value instead of its own descriptive data element. I am OK with doing that for the Data Dictionary, but I think the SPT must remain in checklist form.
- Remove #41, 42, 43, 44: Late pay and Misc charges are simply another type of charge. no need for add'l data elements. Ditto
- #47: Consider moving Taxes outside of charges, since they are usually calculated on sum of charges. The SPT is a checklist of items to communicate to the Billing Party and it has no structure other than that of a listing, therefore, taxes are generically a Charge.
- Remove #51: Bill party maintains 12 month history for mass market bill print. HU data is exchanged via usage transaction. I goofed on this one; forgot to talk about it on the conference call. I don't know where the CPS wants to go with this one, so our lack of attention on this matter is noted accordingly in the Data Dictionary.

We can talk about this on Tuesday in Richmond during the TEIS meeting if there is time on the agenda.

Rick

-----Original Message-----

From: George Behr [mailto:GBehr@EnergyServicesGroup.net]
Sent: Friday, April 16, 2004 9:51 AM
To: Alston, Rick; Meghan McMillan (E-mail)
Cc: Andria Yelverton (E-mail); Annunciata Marino (E-mail); Barb Fatina (E-mail); Barbara Alexander (E-mail); Barbara Wise (E-mail); Bill Barkas (E-mail); Bill Newbold (E-mail); Blake Gross (E-mail); Brenda Shaw (E-mail); Carol Waterbury (E-mail); Christopher Burden (E-mail); Dale Davis (E-mail); Dan Jones (E-mail); Dan Rothfuss (E-mail); Derek Mauzy (E-mail); Dorman Davis (E-mail); Eric Wilen (E-mail); Gail Higashi (E-mail); George Behr; Jean Mason (E-mail); Jim Minneman (E-mail); Judy Ray (E-mail); Kathleen Yetman (E-mail); Ken Thiry (E-mail); Les Nishida (E-mail); Lisa Robert (E-mail); Marcy McCain (E-mail); Mary Edwards (E-mail); Michael Garrett (E-mail); Mike Coyle (E-mail); Patrick Eynon (E-mail); Rick Zollars (E-mail); Ruth Kiselewich (E-mail); Tan Adams (E-mail); Tom Kilgore (E-mail); Tom Ringenbach (E-mail); Tom Rone (E-mail); William J. Wolf (E-mail); Yvette Camp (E-mail)
Subject: SPT input for cons bill ready

Rick,

Here's my annotations for the Consolidated bill ready sample paper transaction. Summary:

- Remove #2: Cust info is kept by bill party
- #3 and 4: We have both bill party acct num and SDID. Most markets use either/or as unique ID. I suggest we change the name of that data element to reflect that (how about 'market account identifier')
- remove #6: Serv addr is maintained by bill party
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- #47: Consider moving Taxes outside of charges, since they are usually calculated on sum of charges
- Remove #51: Bill party maintains 12 month history for mass market bill print. HU data is exchanged via usage transaction.

G

-----Original Message-----

From: Alston, Rick [mailto:RAston@odec.com]
Sent: Friday, April 16, 2004 7:20 AM
To: Meghan McMillan (E-mail)
Cc: Andria Yelverton (E-mail); Annunciata Marino (E-mail); Barb Fatina (E-mail); Barbara Alexander (E-mail); Barbara Wise (E-mail); Bill Barkas (E-mail); Bill Newbold (E-mail); Blake Gross (E-mail); Brenda Shaw (E-mail); Carol Waterbury (E-mail); Christopher Burden (E-mail); Dale Davis (E-mail); Dan Jones (E-mail); Dan Rothfuss (E-mail); Derek Mauzy (E-mail); Dorman Davis (E-mail); Eric Wilen (E-mail); Gail Higashi (E-mail); George Behr (E-mail); Jean Mason (E-mail); Jim Minneman (E-mail); Judy Ray (E-mail); Kathleen Yetman (E-mail); Ken Thiry (E-mail); Les Nishida (E-mail); Lisa Robert (E-mail); Marcy McCain (E-mail); Mary Edwards (E-mail); Michael Garrett (E-mail); Mike Coyle (E-mail); Patrick Eynon (E-mail); Rick Zollars (E-mail); Ruth Kiselewich (E-mail); Tan Adams (E-mail); Tom Kilgore (E-mail); Tom Ringenbach (E-mail); Tom Rone (E-mail); William J. Wolf (E-mail); Yvette Camp (E-mail)
Subject: Workpapers from 4/13/04 CPS conference call-delivery #1