

## **Enabling Dual Billing for TOU / NM Customers**

There are changes needed to the EDI 810, 867 and 814 transactions to fully support dual billing for net metering and/or time of use (NM/TOU) customers. Some of the utilities have already enabled certain of these requirements, as indicated below:

### **1. 810 Monthly Usage / Invoice transaction:**

- a. Requirement: communication of 2- or 3-part TOU in the monthly 810 invoice/usage transaction.

- i. Currently supported by Eversource and NHEC (for 2-part TOU).
- ii. Supported in current 810 specification using the MEA 07 element.
- iii. Guide provides for valid values, including:
  - 22 - Actual
  - 51 - Total
  - 41 - Off Peak
  - 42 - On Peak
  - 66 - Shoulder

- iv. Example transactions:

#### 2-part TOU:

MEA\*\*\*1200.5\*KH\*\*\*51

MEA\*\*\*800\*KH\*\*\*41

MEA\*\*\*400.5\*KH\*\*\*42

#### 3-part TOU:

MEA\*\*\*1200.5\*KH\*\*\*51

MEA\*\*\*800\*KH\*\*\*41

MEA\*\*\*300\*KH\*\*\*42

MEA\*\*\*100.5\*KH\*\*\*66

- b. Requirement: communication of net negative usage in the monthly 810 invoice/usage transaction.

- i. Currently supported by NHEC (for some NM customers using a negative rate).
- ii. Supported in current 810 specification using a negative in the MEA 03 element.
- iii. Example transactions:

#### NM w/o TOU:

MEA\*\*\*-750\*KH\*\*\*22

#### NM w/ 3-part TOU:

MEA\*\*\*850.5\*KH\*\*\*51

MEA\*\*\*800\*KH\*\*\*41

MEA\*\*\*-100\*KH\*\*\*42

MEA\*\*\*150.5\*KH\*\*\*66

**Attachment 1:** EDI-EBT Business Rules Subgroup Meeting (3/25/24)  
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**2. 867 Historical Usage transaction:**

a. Requirement: communication of 2- or 3-part TOU in the historical usage 867 transaction.

- i. Currently supported by NHEC (for 2-part TOU).
- ii. Supported in current 867 specification using the MEA 07 element.
- iii. Guide provides for valid values, including:

- 22 - Actual
- 51 - Total
- 41 - Off Peak
- 42 - On Peak
- 66 – Shoulder

iv. Example transactions:

2-part TOU:

MEA\*\*\*1200.5\*KH\*\*\*51

MEA\*\*\*800\*KH\*\*\*41

MEA\*\*\*400.5\*KH\*\*\*42

3-part TOU:

MEA\*\*\*1200.5\*KH\*\*\*51

MEA\*\*\*800\*KH\*\*\*41

MEA\*\*\*300\*KH\*\*\*42

MEA\*\*\*100.5\*KH\*\*\*66

b. Requirement: communication of net negative usage in the historical usage 867 transaction.

- i. Currently supported by NHEC (for some NM customers) and Unitil.
- ii. Supported in current 867 specification using a negative in the MEA 03 element.<sup>26</sup>
- iii. Example transactions:

NM w/o TOU:

MEA\*\*\*-750\*KH\*\*\*22

NM w/ 3-part TOU:

MEA\*\*\*900.5\*KH\*\*\*51

MEA\*\*\*800\*KH\*\*\*41

MEA\*\*\*-100\*KH\*\*\*42

MEA\*\*\*200.5\*KH\*\*\*66

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<sup>26</sup> This assumes use of the MEA 03 element as specified in the MA EBT standard, or alternatively, this could be done as specified in the NH EDI standard for 867 transactions for “any measurement requiring a sign (+ or-), or any measurement where a positive (+) value cannot be assumed, use MEA05 as the negative (-) value and MEA06 as the positive (+) value.”

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- c. Requirement: communication of distribution tariff rate, including TOU options, in the historical usage 867 transaction.
  - i. Currently supported by NHEC, Eversource and Liberty.
  - ii. Unitil currently only provide rate class (D, G1, G2, etc.), and not distribution tariff rate (which would identify TOU options, e.g., TOU-D, TOU-EV-D, etc.).
  - iii. Supported in 867 specification using the REF NH 02 segment. (Current field allows adding the additional detail re: TOU options that Unitil is missing.)

**3. 814 Account Administration transaction:**

- a. Requirement: communication of customer distribution tariff rate changes, via an 814 change request (to enable CPAs/CEPS to be notified when a customer changes to a TOU rate, which may require switching the customer to dual billing service).
  - i. Currently supported by Eversource and NHEC (pending confirmation). Liberty supports via a load profile (REFLO) change (pending confirmation).
  - ii. Supported in current 814 specification using a change type of REFNH.
- b. Requirement: communication of NM enrollment and un-enrollment, via an 814 change request (to enable CPAs/CEPS to be notified when a customer switches net energy metering, which may warrant additional materials to be sent to the customer, a change to/from dual billing, and other actions to be taken by the CPA/CEPS):
  - i. Currently appears to only be supported by Liberty, and NHEC supports via rate changes, since their NM types are all specific rates.
  - ii. Supported in current 814 specification using a change type of REFKY.
- c. Requirement: communication of type of NM customer via 814 enrollment and account administration transactions, including the type of net metering (1.0 vs 2.0 and preferably Group Host)
  - i. Currently only NHEC identifies type of net metering (in the utility distribution tariff rate).

MA EDI specification allows for communication of Net Metering via REF KY, but only provides for one value of "NETMETER". Eversource, Unitil and Liberty are already providing this per the MA EDI Standard and should distinguish the specific type of net metering in the REF 02 field — which could be specified as, for example, "NETMETERHOST", "NETMETER1", "NETMETER2", and in future, "NETMETER3", etc.w