

PA Seamless Moves & Instant Connects

Met-Ed, Penelec, Penn Power, West Penn Power

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Seamless Move: Overview

Description:

- A *seamless move* is the ability of a customer's choice of supplier to move with the customer to a new address within a single service territory without interruption.

Process:

- A customer must call the FirstEnergy contact center and provide the representative with both the move in date at the new location and the move out date at the current location. The move out date relative to the move in date must be 3 business days or less to be considered for a seamless move. These dates need to be provided during the same phone call.
- If the customer meets all additional eligibility requirements established for a seamless move, the contact center representative will communicate to the customer that they are eligible for a seamless move and their existing supplier will transfer with them to their new location.
- An 814M transaction will automatically be sent to the supplier notifying them of the impending seamless move. No additional communication needs to take place between the utility and the supplier for the transaction to be completed.

Eligibility Requirements – Seamless Move

Eligibility

1. Customer must have an active account with the Company
2. Customer must have an existing relationship with an EGS serving at the customer’s current premise.
3. Customer does not have a pending change to a new EGS.
4. Customer plans to move within the same Operating Company and provides at least one day advance notice prior to the move.
5. The new location must be an active premise.
6. The move in date and the move out date must be within 3 days of each other.
7. Customer will remain within the same residential or commercial rate class and must have the appropriate metering available at the new location.

Eligible Rate Codes:

These eligible rates listed are also the rates that can take part in the Customer Referral Program (CRP)

Eligible Rates for Seamless Moves			
<u>Operating Company</u>	<u>Rate Code</u>	<u>Account Class</u>	<u>Rate Description</u>
Metropolitan Edison	RS	Res	Residential Service
	GSV	Res	Volunteer Fire Co. and Non Profit
	GSS	Com	General Service Secondary - Small
Penelec	RS	Res	Residential Service
	GSV	Res	Volunteer Fire Co. and Non Profit
	GSS	Com	General Service Secondary - Small
PennPower	RS	Res	Residential Service
	GSR	Res	Volunteer Fire Co. and Non Profit
	GSS	Com	General Service Secondary - Small
WestPennPower	RS10	Res	Residential Service
	GS10	Res	Volunteer Fire Co. and Non Profit
	GS20	Com	General Service Secondary - Small

8. Customer will use same account name at new premise. (If the customer uses a different name at the new location it will be eligible for an instant connect)

Seamless Move Examples

Basic Seamless Move Move In date before Move Out date
Customer called Thurs 9/8/16
Move out date Tues 9/13/16
Move in date Friday 9/9/16
FirstEnergy Move-in / Move out process executed as a seamless move with the requested effective dates.
Move out is created for 9/13/16.
814M is created and sent to supplier to notify of customer move.
814D sent to Supplier for Premise A. Use B38 drop reason.
Pending Move in is created at Premise B.
Contract values for Supplier from Premise A are gathered and transferred to new supplier contract at Premise B upon contract creation.

Basic Seamless Move Move Out date before Move In date
Customer called Thurs 9/8/16
Move out date 9/9/16
Move in date 9/13/16
FirstEnergy Move-in / Move out process executed as a seamless move with the requested effective dates.
Move out is created for 9/09/16.
814M created and sent to supplier to notify of customer move.
814D sent to Supplier for Premise A. Use B38 drop reason.
Pending Move in is created at Premise B for 9/13/16.
Contract values for Supplier from Premise A are gathered and transferred to new supplier contract at Premise B upon contract creation.

Move out or Move In date change
Customer called 9/7/16
Move out date 9/9/16
Move in date 9/13/16
FirstEnergy Move-in / Move out process executed as a seamless move with the requested effective dates.
Move out is created for 9/09/16.
814M created and sent to supplier to notify of customer move.
814D sent to Supplier for Premise A. Use B38 drop reason.
Pending Move in is created at Premise B for 9/13/16.
Contract values for Supplier from Premise A are gathered and transferred to new supplier contract at Premise B upon contract creation.
Customer calls on 9/8/16 and wants move out or move in date changed.
814C sent to supplier

Instant Connect: Overview

Description:

- An *Instant connect* is the ability of supply service to start on “day one” of new utility service – without the customer first having to go on default service.

Process:

- Once the customer sets up service at the new location, the customer will need to contact the supplier, and the supplier will need to send an EDI Enrollment transaction.
- A supplier will send an enrollment, and as long as the customer has a pending move in, the supplier will be tied to that location to begin service effective the first day of the customer’s move in.
 - Today, an enrollment on a pending move in would reject and the customer would need to be served under default service prior to switching to a supplier.
- The supplier will receive an enrollment response with an instant connect indicator.
- We will continue to accept supplier activity on the pending active account. We will follow “last in” rules for subsequent enrollments.

Eligibility Requirements – Instant Connect

Eligible:

- We will accept and process any 814 enrollment received on a pending active account.
 - If an enrollment is received on the move in date or later, it would follow standard accelerated switching rules.
- All account classes / rate categories are eligible.

Ineligible:

- New construction
- A service that does not yet have a meter set
- Requests for same day or backdated move-in

***Instant Connect enhances our current customer referral program. Today suppliers must hold allocated enrollments until the customers move in date. With instant connect, suppliers can send the enrollments as they are received.**

Instant Connect Examples

Basic Instant Connect Supplier sends 814E before Move in date
Customer called 9/8/16 to initiate service at new location. Move in date is 9/17/16.
Move in executed as normal process, and Supply contract created as default service.
Supplier sends 814E, received 9/14/16.
Existing default supply contract fields are overlaid with those of the Supplier. Customer billing starts with the supplier as of the move-in date.
814 Response sent to Supplier. Response will have new "IC" value to indicate the move in was processed as Instant Connect.
EDC enrollment letter is sent on 9/18/16.

Instant Connect Customer calls to cancel Move in before Move in date
Customer called 9/8/16 to initiate service at new location. Move in date is 9/17/16.
Move in executed as normal process, and Supply contract created as default service.
Supplier sends 814E, received 9/14/16.
Existing default supply contract fields are overlaid with those of the Supplier. Customer billing starts with the supplier as of the move-in date.
814 Response sent to Supplier. Response will have new "IC" value to indicate the move in was processed as Instant Connect.
On 9/10/16, customer calls to cancel move in
814D is sent to notify supplier with drop reason ICW.
No EDC enrollment letter would be sent.

Instant Connect Different supplier sends 814E before the move-in date
Customer called 9/8/16 to initiate service at new location. Move in date is 9/17/16.
Move in executed as normal process, and Supply contract created as default service.
Supplier sends 814E, received 9/10/16.
Existing default supply contract fields are overlaid with those of the Supplier. Customer billing starts with the supplier as of the move-in date.
814 Response sent to Supplier A. The Response will have new "IC" value to indicate the move in was processed as an Instant Connect.
814E received from different Supplier on 9/14/16.
Supplier A values are overlaid with those of Supplier B on the supply contract, with the same move in effective date and contract number.
814 Response sent to Supplier B. The Response will have new "IC" value to indicate the move in was processed as an Instant Connect.
814D sent to Supplier A with drop reason CHA.
EDC enrollment letter is sent on 9/18/16.

Seamless Move / Instant Connect Implementation Timeline*:

- FirstEnergy plans to phase in our implementation
 - WestPenn Power - 9/12/16
 - MetEd & Penelec - 9/14/16
 - PennPower - 9/19/16
- If a defect has been found in production, a communication will be sent to the suppliers. The communication will advise if seamless move or instant connect functionality needs turned off.
- The company would work towards having both seamless move and instant connects for all Operating companies functional by 9/26/16.

***Timeline subject to change.**

EDI Changes

- **814M** – A new transaction that is generated from the EDC and sent to an EGS when a seamless move takes place.
- **ICW (Instant Connect Withdrawn) Indicator** – If a customer cancels an instant connect prior to its start, we will send ICW in the 814D.
- **SMW (Seamless Move Withdrawn) Indicator** – If a customer cancels a seamless move prior to its start, we will send SMW in the 814D.
- **Instant Connect Response** – Sent from utility on 814ER to notify suppliers of an instant connect.

814 Move Transaction

814M

```
BGN*13*000040829*20160810
N1*8S*METED-DISTRIBUTION*1*007916836**41
N1*SJ*SUPPLIER NAME*9*123456789PA00**40
N1*8R*CUSTOMER NAME
N3*7462 NEPTUNE AVE
N4*READING*PA*19605*US
PER*IC*CUSTOMER NAME*TE*6108881258
N1*BT*CUSTOMER NAME
N3*153 NOPETS ST
N4*BANGOR*PA*18013*US
PER*IC*CUSTOMER NAME*TE*6108881258
LIN*201608100000268309M*SH*EL*SH*CE
ASI*27*025
REF*12*08001518500001234567
REF*45*08001518500008909876
REF*11*9999995K
REF*BLT*LDC
REF*PC*LDC
REF*SPL**ME01
REF*BF*64
DTM*150*20160819
AMT*DP*0.98
AMT*KC*0.60
AMT*KZ*2.31
NM1*MQ*3*****32*FN0007343
REF*LO*RSHT
REF*NH*ME-RSD
REF*RB*F1467
REF*TZ*64
REF*SV*Service voltage unknown
REF*LF*1.071800
REF*MT*KHMON*1
REF*TU*51*KHMON
REF*4P*1.00000*KHMON*1
REF*IX*5.0*KHMON*1
```

New Indicators

Instant Connect Withdrawn (814D)

BGN*13*075773469*20160701
N1*8S*PENELEC-
DISTRIBUTION*1*008967614**41
N1*SJ*SUPPLIER NAME*9*123456789PA01**40
N1*8R*CUSTOMER NAME
PER*IC*CUSTOMER NAME*TE*8149991256
LIN*20160701115739773469*SH*EL*SH*CE
ASI*F*024
REF*1P*ICW*INSTANT CONNECT WITHDRAWN
REF*12*08057747680001234567
DTM*151*20160708

Seamless Move Withdrawn (814D)

BGN*13*075777157*20160729
N1*8S*PENELEC-DISTRIBUTION*1*008967614**41
N1*SJ*SUPPLIER NAME*9*123456789PA00**40
N1*8R*CUSTOMER NAME
PER*IC*CUSTOMER NAME*TE*7179991234
LIN*20160729171707777157*SH*EL*SH*CE
ASI*F*024
REF*1P*SMW*SEAMLESS MOVE WITHDRAWN
REF*12*08051461040009806543
DTM*151*20160801

Instant Connect Response (814ER)

Instant Connect Response

BGN*11*075773370*20160624***98
N1*8S*PENELEC-DISTRIBUTION*1*008967614**41
N1*SJ*SUPPLIER NAME*9*123456789PA00**40
N1*8R*CUSTOMER NAME
N3*106 MAPLE ST
N4*SOUTH FORK*PA*15956*US*CO*Cambria
N1*BT*CUSTOMER NAME
N3*128 CONSTITUTION AVE
N4*READING*PA*19606*US
LIN*98 CE 201401071057*SH*EL*SH*CE
ASI*WQ*021
REF*12*08010378420004567891
REF*BLT*LDC
REF*PC*LDC
REF*SPL*PN01
REF*IC*Y
REF*BF*63*D22044750*1
DTM*129*20151030*1200*ET
AMT*7N*1
AMT*QY*1
AMT*KC*2.24
AMT*KZ*2.41
NM1*MQ*3*****32*D22044750
REF*LO*RSNH
REF*NH*PN-RSD
REF*RB*F1299
REF*TZ*63
REF*SV*Secondary, voltage unknown
REF*LF*1.094500
REF*MT*KHMON*1
REF*TU*51*KHMON
REF*4P*1.00000*KHMON*1
REF*IX*5.0*KHMON*1

Questions:

Q1. Should we expect drops on the old account number in all cases?

A1. Yes, a drop should occur on Premise A for a seamless move in all cases.

Q2. Will the old account number be reused?

A2. No, a new account number will be used for the customer at Premise B.

Q3. When is the 814M generated and sent to the EGS? How about drops?

A3. The 814M is generated at the time of the customer move in / move out. Even if a customer performs a future dated move in / move out, the 814M will be sent the day of the customer call. A drop will follow the same logic as the 814M.

Q4. Can I submit a 814C on premise A after the seamless move is in process?

A4. We would accept and process as long as it is prior to the account becoming final.

Q5. Can I submit a 814C on premise B on a pending seamless move?

A5. The 814C would reject and would need to be resubmitted once the account is active.

Q6. Can a supplier call the FirstEnergy Contact Center and perform a seamless move on behalf of the customer?

A6. No, the customer must initiate the seamless move by calling the FirstEnergy Contact Center and completing both a move in & a move out on the same phone call.

Questions Cont.

Q7. Does a seamless move generate a new customer account number? Is the account number going to be on the 814M that is received?

A7. A seamless move will generate a new account number. The account number will be provided via the 814M transaction.

Q8. How far in advance can a customer request a seamless move?

A8. FirstEnergy will accept a move in & move out up to 90 days in advance.

Q9. Can an EGS serve a customer at 2 locations for a period of time under a seamless move?

A9. An EGS can serve a customer at two locations for up to 3 business days.

Q10. IC examples said “Default service” will be overlaid - does this mean that an IC supplier will be their default in the event of switching suppliers and then de-enrolling?

A10. When a customer moves into a new location the utility assumption is they will take service under default service. If an enrollment comes in prior to the customer move in, it will start effective day one of move in. In the case of multiple enrollments prior to the customer move in, if the customer performed a drop, they would go back to default service.

Questions Cont.

Q11. When can an enrollment be sent on an instant connect customer? When will it become effective?

A11. An enrollment will be accepted as an instant connect anytime prior to the customer's move in date. If the enrollment is received after the customer's move in date it will be treated as an accelerated switch.

Q12. Which premise will I receive an 814C on for a seamless move?

A12. Depending on the scenario the EGS should expect the following: If the move out date changes, then an 814C will be sent on Premise A. If the move in date changes, then an 814C will be sent for Premise B. If both the move in / move out dates change, the EGS should receive an 814C on both premises.

Q13. Will this presentation be e-mailed out to all participants after the call? Or, will it be available for download from the Supplier portal?

A13. Yes, once all questions are captured from today's Wednesday's webinar, we will send out the final presentation and post to our supplier website.