



# JOINT UTILITIES OF NEW YORK

## Customer Data

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Summary of September 14, 2017 Stakeholder Engagement Group Meeting



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1



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# September 14, 2017 Agenda

Time	Topic
10:30 – 10:45	<b>Introductions</b> <ul style="list-style-type: none"><li>▪ Purpose and Objectives</li><li>▪ Ground Rules</li><li>▪ Engagement Process Overview</li></ul>
10:45 – 11:15	<b>Brief Overview and Update on 2017 Commitments and Activities since April 2017 Engagement</b>
11:15 – 11:45	<b>Customer Data Sharing</b> <ul style="list-style-type: none"><li>• <i>Millene Hahm, ConEdison</i></li></ul>
11:45 – 12:30	<b>Aggregation Data Availability &amp; Use Cases</b> <ul style="list-style-type: none"><li>• <i>Ritchie Hudson, Constellation</i></li><li>• <i>Sara Margaret Geissler, ConEdison</i></li></ul>
12:30 – 1:00	<b>Summary and Wrap-up</b>



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# Key Stakeholder Feedback from September 14 Session

Stakeholder Input	Discussion Points	Next Steps
<p><i>Regarding 2016 recap and 2017 Customer Data WG Implementation Plan:</i></p> <ul style="list-style-type: none"> <li>Are you looking into a machine readable data repository for aggregated data?</li> </ul>	<ul style="list-style-type: none"> <li>The utilities explained that aggregated data is not being provided in a machine readable format. There hasn't been a need to make an Application Program Interface (API), or similar Green Button Connect interface, for aggregated data thus far.</li> <li>NYC has legislation to benchmark whole building customer data. ConEd will be implementing automatic upload to EPA's Energy Star Portfolio Manager by the end of the year, as agreed in their 2016 rate case</li> <li>As part of their 2016 rate proceedings, KEDNY and KEDLI are also working to develop and implement a solution to provide automatic uploads of aggregated energy consumption data for buildings in NYC to the EPA's Portfolio Manager website. Building owners will be permitted to opt-out of the automatic uploads and instead receive consumption data manually</li> <li>CCA data, and aggregated data, has been a growing request, but not significant enough to build APIs at the moment</li> </ul>	<p><b>OPEN</b> –Utilities are working with NYSERDA and other parties to build a “utility energy registry” (UER) for high level demographic information across New York state. Utilities are evaluating potentially providing this data in an automated fashion to NYSERDA, but will need to determine how much it is needed by stakeholders and what data is appropriate to be made public through the UER before sending data to NYSERDA</p>



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<p><i>Regarding <u>whole building</u> privacy standards:</i></p> <ul style="list-style-type: none"> <li>Does the 4/50 standard apply to the open access model or if an individual business owner were requesting that data?</li> <li>Is there an alternate means for building owners to request data?</li> </ul>	<ul style="list-style-type: none"> <li>The JU explained their proposed 4/50 whole building privacy standard applies to owners (or the authorized agents) to protect the privacy of individual tenants while still trying to facilitate the goals of REV</li> <li>The JU reminded the stakeholders the 4/50 standard was chosen because it was the most applicable model and was based in Colorado's standards</li> <li>The JU highlighted the whole building privacy standard has an exception if a building owner needs the data for legal compliance. In this circumstance, they are allowed to receive the customer data for buildings with less than 4 tenants or if one of the tenants consumes more than 50% of the energy used in the building</li> <li>Building owners can ask for tenant consent to access their data and utilities will provide the data after receiving tenant letters of authorization</li> </ul>	<p><b>OPEN</b> – The Department of Public Service invited stakeholders to submit comments to the proposed JU 4/50 whole building privacy standard. Comments were due October 10th</p>



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# Key Stakeholder Feedback from September 14 Session

Stakeholder Input	Discussion Points	Next Steps
<p><i>Regarding customer data sharing implementation plans for CECONY and O&amp;R :</i></p> <ul style="list-style-type: none"> <li>Can utilities define the third party authorization access process?</li> <li>Does a customer need to click through the GBC authorization or are there other options?</li> </ul>	<ul style="list-style-type: none"> <li>The third party authorization process is defined within the GBC scheme. The CECONY and O&amp;R team is building it to follow the GBC spec, which allows customers to start the authorization process on either utility or third party sites (e.g., authorization filled out on utility site, then moves to a third-party site that allows the user to make additional selections within GBC).</li> <li>Works differently for ESCOs as they are load serving entities with presumed consent. CECONY and O&amp;R will use the same APIs built for GBC, but w/out customer consent piece</li> <li>EDI will continue to be used by all utilities for ESCO transactions</li> </ul>	<p><b>OPEN</b> – CECONY and O&amp;R will continue to monitor the data requests and protocols during GBC implementation.</p> <p>Other JU members are on different time schedules for implementing GBC or “GBC-like” applications</p>



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# Key Stakeholder Feedback from September 14 Session

Stakeholder Input	Discussion Points	Next Steps
<p><i>Regarding customer data sharing implementation plans for CECONY and O&amp;R :</i></p> <ul style="list-style-type: none"> <li>Will the data shared be the total amount on the bill, or will there be a breakdown at each billing determinate level?</li> <li>How are they planning to address the account number and service number with respect to the customer data privacy?</li> </ul>	<ul style="list-style-type: none"> <li>CECONY and O&amp;R GBC Phase 2 data will provide the total bill amount for each commodity for each billing cycle, but does not include further breakdown by line item</li> <li>CECONY and O&amp;R will not send customer identifiable data over the API</li> <li>CECONY and O&amp;R are not planning on providing the premise ID number</li> <li>The Green Button Alliance clarified retail customer personal information (i.e. service location, demographic information) can be omitted by the customer. They would need to authorize that the information be provided based on the current standard. This is called the GBC retail customer module.</li> </ul>	<p><b>CLOSED</b> – No further action needed</p> <p>Follow-up from CECONY and O&amp;R: Service Point is visible but does not represent any location-specific information. The only customer-specific information provided is the meter number.</p>



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<p><i>Regarding customer data sharing implementation plans for CECONY and O&amp;R :</i></p> <ul style="list-style-type: none"> <li>Green Button Alliance (GBA) available to support the JU in a smooth implementation and rollout</li> <li>To do non-intrusive load monitoring for harmonics, etc; are utilities looking at the Zigbee Gateway for even higher granularity? Will be of interest to large customers</li> </ul>	<ul style="list-style-type: none"> <li>CECONY and O&amp;R are looking to join the GBA to learn more about the protocols for implementation</li> <li>CECONY and O&amp;R reminded stakeholders this proposal applies to their Phase 2 of GBC. Additional stakeholder meetings will be needed in the future to determine what additional data is needed, and relative priorities.</li> <li>CECONY and O&amp;R have ZigBee chips in their AMI meters. Will follow up on plans to pilot this functionality. Also, there is a whole set of pricing pilots, and REV demonstration projects, e.g., Smart Home Rate, that gets deeper into the complexity of pricing schemes and collecting that data. All the devices in that pilot will be tested for connectivity and how they interface with each other.</li> </ul>	<p><b>CLOSED</b> – No further action needed</p> <p>Follow-up from CECONY and O&amp;R: Companies currently have no plans for a ZigBee demonstration project. We will assess the applicability of HAN for new services or programs and will leverage the best communication mechanism (e.g., HAN, WiFi, or other) that is easiest and most powerful for the customer.</p>



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# Key Stakeholder Feedback from September 14 Session

Stakeholder Input	Discussion Points	Next Steps
<p><i>Regarding customer data sharing implementation plans for CECONY and O&amp;R :</i></p> <ul style="list-style-type: none"> <li>Have the JU thought about using GBC for the usage data that comes through on a more frequent basis? (i.e. reducing the latency of the transmission from the meter back to the utility and the third-party. It was previously described as a 30-45 minute latency delay for some applications)</li> </ul>	<ul style="list-style-type: none"> <li>For CECONY and O&amp;R, Phase 2 of AMI (Q3 2018) is separate from Phase 2 of GBC (EOY 2018).</li> <li>CECONY and O&amp;R's Phase 2 AMI will allow customers to access information in near-real time, e.g., will allow third-parties to pull that information about 30-45 mins after that metering reading interval ends. Information will also be visible to customers on My Account after 30-45 min</li> <li>Basic data will be available free of charge on a one-day lag, per the Track 2 Order. If parties are interested in data at a higher frequency, the JU will consider that value-added data and may propose to charge for it.</li> </ul>	<p><b>CLOSED</b>– no further action needed</p>



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<p><i>Regarding customer data sharing implementation plans for CECONY and O&amp;R :</i></p> <ul style="list-style-type: none"> <li>Are CECONY and O&amp;R customers able to select additional protections in the data sets shared with third parties? (e.g., blocking address sharing)</li> <li>How far back can historic data be provided?</li> </ul>	<ul style="list-style-type: none"> <li>CECONY and O&amp;R will follow the GBC spec. Technical experts not present to answer these questions, but will probably follow approach of utilities like PG&amp;E, which requires customer to authorize which datasets it wants utility to share with third parties.</li> <li>The Green Button Alliances mentioned the retail module as a separate resource that requires retail customer to authorize access to data just as any other module.</li> <li>For CECONY and O&amp;R the available customer historic data will be up to 24 months or the life of the account, whichever is shorter</li> </ul>	<p><b>OPEN – TBD</b></p>



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Stakeholder Input	Discussion Points	Next Steps
<p><i>Regarding customer data sharing implementation plans for CECONY and O&amp;R :</i></p> <ul style="list-style-type: none"> <li>Are CECONY and O&amp;R still considering a frequency of 5 minutes for C&amp;I and 15 minutes for residential?</li> <li>Will all customers have access to GBC regardless if they have an AMI meter or not?</li> </ul>	<ul style="list-style-type: none"> <li>For CECONY and O&amp;R, AMI meters will provide a 5-min and 15-min data resolution for electric commercial and residential customers, respectively. Legacy electric interval meters will continue to provide 15-min intervals (regardless of customer type) until they are replaced with AMI meters. Gas AMI meters will record 1-hour intervals for all customer types.</li> <li>At CECONY and O&amp;R, all customers will have access to GBC data sharing functionality. The difference is that as AMI meters are deployed, the data will be available at more granular intervals (i.e. from monthly to interval). Other utilities may not offer data this granular, or near-real time latency – depends on their AMI Business Plans.</li> <li>CECONY and O&amp;R customers with legacy interval meters will still use Customer Care website to access their data until they receive an AMI meter, but authorized third parties will be able to access their data via GBC</li> </ul>	<p><b>CLOSED</b>– no further action needed</p>



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<p><i>Regarding customer data sharing implementation plans for CECONY and O&amp;R :</i></p> <ul style="list-style-type: none"> <li>What are the utilities plans for testing implementation of GBC? (Some parties may be interested in assisting with the testing process)</li> <li>What are the options for testing GBC in a sandbox for third-parties to make sure their systems are correctly interface with GBC from the start, and also after updates?</li> </ul>	<ul style="list-style-type: none"> <li>CECONY and O&amp;R originally planned to conduct user acceptance testing with third parties, but third-parties have asked to charge utilities for their services in a test environment.</li> <li>CECONY and O&amp;R created a sandbox for internal use where consultants are testing system (will be complete by end of year).</li> <li>Because there will be updates to releases on a web service, the utilities plan to test each update in a sandbox before launching each update and exchanging real data.</li> <li>Real customer data will begin to be exchanged after launch of GBC in January 2018, consultants will be involved in the technical onboarding of third parties.</li> <li>CECONY and O&amp;R do not plan to begin onboarding third parties until they can demonstrate that they are PSC-approved DERs.</li> </ul>	<p><b>OPEN</b> – CECONY and O&amp;R will follow up with stakeholders that expressed interest in assisting with UAT.</p>



# Key Stakeholder Feedback from September 14 Session

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<p><i>Regarding customer data sharing implementation plans for CECONY and O&amp;R :</i></p> <ul style="list-style-type: none"> <li>How will utilities approach technical support?</li> <li>How are problems identified and resolved for data that is not transmitted?</li> <li>How do third parties contact the utility if the data does not match with the bill?</li> <li>Will the utilities use a ticketing system to track GBC issues?</li> </ul>	<ul style="list-style-type: none"> <li>For CECONY and O&amp;R, once DER is approved, will have technical onboarding process</li> <li>CECONY and O&amp;R will be offering technical onboarding and a support system for the third-parties to work with to resolve issues with sending and receiving information from the utility. Details TBD.</li> <li>CECONY and O&amp;R will provide guidance to customers on who to call to resolve any authorization-related issues. Details TBD.</li> </ul>	<p><b>CLOSED</b> – No further action needed.</p> <p>Follow-up from CECONY and O&amp;R: Companies will provide onboarding support as part of the third-party registration process, including a test production environment. Will also continue to provide technical support (with a ticketing system) after third-parties have successfully completed onboarding.</p>



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<p><i>Regarding customer data sharing implementation plans for CECONY and O&amp;R :</i></p> <ul style="list-style-type: none"> <li>Once AMI is fully deployed, will there be implications with the wholesale settlement process? Utilities sometimes begin to make smart meter data available before it is incorporated into the wholesale settlement process, and sometimes the ESCO ends up paying for a mismatched load profile.</li> <li>Are utilities planning on making transmission capacity tags available via GBC or other third party platforms if they are used in New York?</li> </ul>	<ul style="list-style-type: none"> <li>CECONY and O&amp;R recognize the concern and will need to get back with answers from the technical experts.</li> <li>Utilities will provide transmission capacity to ESCO if they become responsible for this capacity with the NYISO.</li> </ul>	<p><b>OPEN</b> – CECONY and O&amp;R to follow up with individual party on transmission tag question.</p> <p>Follow-up from CECONY and O&amp;R: Companies plan on using AMI data for ICAP purposes starting with the 2019 ICAP capability period (based on summer 2018 interval data).</p>



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13



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# Key Stakeholder Feedback from September 14 Session

Stakeholder Input	Discussion Points	Next Steps
<p><i>Regarding customer data sharing implementation plans for CECONY and O&amp;R :</i></p> <ul style="list-style-type: none"> <li>Do the utilities see the need for a machine readable tariff data? Is that on the agenda or on the horizon?</li> </ul>	<ul style="list-style-type: none"> <li>For all of the utilities, machine readable tariff data is far on the horizon and not in the scope of CECONY and O&amp;R's GBC Phase 2.</li> <li>California started doing AMI 10 years ago, and are far ahead in terms of deployment, tariffs, etc. The JU are not that far along and are still working through the foundational systems/processes before they can provide machine readable tariff data.</li> <li>Agreed that the request for machine-readable tariffs coming from market participants is really focused on rate-related information in the tariff (i.e., DERs are not as concerned with all of the other terms and rules included in a utility's tariff, such as special meter reading fees and excess distribution facilities charges). This is a great example of why having focused business use case discussions will help the JU unpack broad data requests like this one, and get down to what data is truly needed and how feasible it might be to provide.</li> </ul>	<p><b>OPEN</b> – The JU will continue to have individual interviews with stakeholders to get a sense of their customer data needs</p>



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# Key Stakeholder Feedback from September 14 Session

Stakeholder Input	Discussion Points	Next Steps
<p><i>Regarding customer data <u>use cases</u> developed with ESCOs:</i></p> <ul style="list-style-type: none"> <li>Do utilities have meter installation targets according to a schedule?</li> <li>In other states with CCA programs, the ESCO would receive customer specific information but it would not be customer identifiable.</li> <li>Under the Westchester program, did CECONY and NYSEG provide an account number before the enrollment to the ESCO?</li> </ul>	<ul style="list-style-type: none"> <li>CECONY has a scheduled plan to rollout the AMI meters at a rate of about 5,000 meters a day. High-level schedule is in the AMI Business Plan. CECONY will also be reporting on AMI deployment process as required in its 2016 Joint Proposal – will be filed in Case 16-E-0060.</li> <li>During deployment, tracking data on “# of smart meters installed” is difficult because the number of smart meters installed vs the number of smart meters commissioned will vary day to day with deployment</li> <li>The CCA Order spells out very clearly what information should be provided by the utility, to whom, and when. The utilities all intend to follow the Order.</li> <li>Yes, under the Westchester program, CECONY provided the account number prior to enrollment with the ESCO (as part of the opt-out mailing list).</li> </ul>	<p><b>CLOSED</b> – no further action needed.</p>





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