LOA Workshop

Welcome!

- Join through Teams to see! If you have trouble with your computer audio, you can call the Team's line for audio
  1- 614-706-7239 Phone Conference ID: 505 339 790#
- Everyone will be muted during presentation

- Use chat functionality for questions and comments

- Participants will have the opportunity to come off mute at the end of the presentation for additional questions

AEP Ohio
Letter of Authorization (LOA)
Refresher

May 2022

AEP Customer Choice

Robert Hewitt - Supervisor

- Anita Ford – Market Specialist
- Carol Miles – Market Coordinator
- Tamara Byrd – Market Support
- Kelsey Roessler – Functional System Analyst
- Shawn Frazier – Functional System Analyst
- Stephanie Lepore - Functional System Archt

Agenda

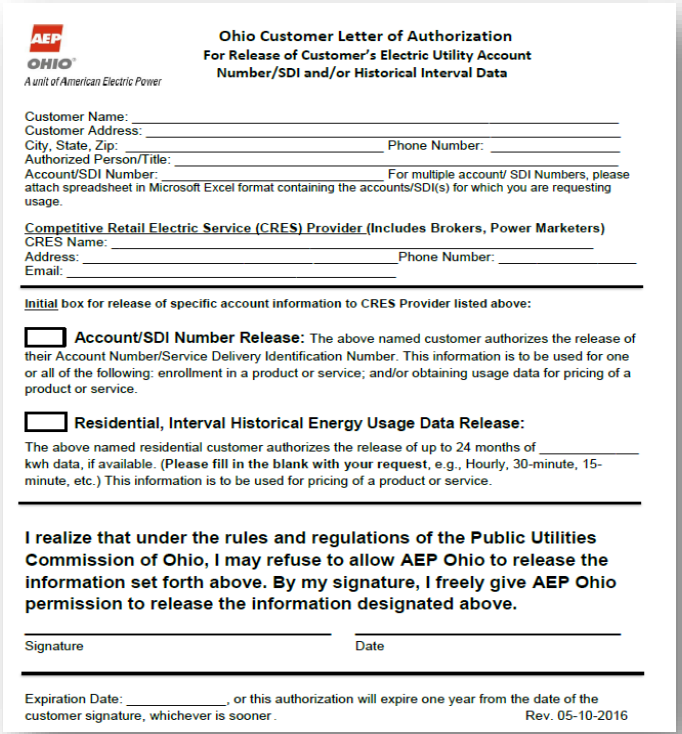
- AEP Ohio Letter of Authorization (LOA)
- Business Partner Portal (BPP) LOA Upload Process
- AEP's LOA Audit
- Summary
- Questions/Answers

Why this LOA

- Market Development Working Group (MDWG)
  - Met with suppliers wanting a standardized LOA
- PUCO staff adopted a new LOA
  - LOA was ready for use in early 2016
- All EDUs in Ohio use this LOA

Two LOAs

Non IDR LOA



AEP OHIO
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.

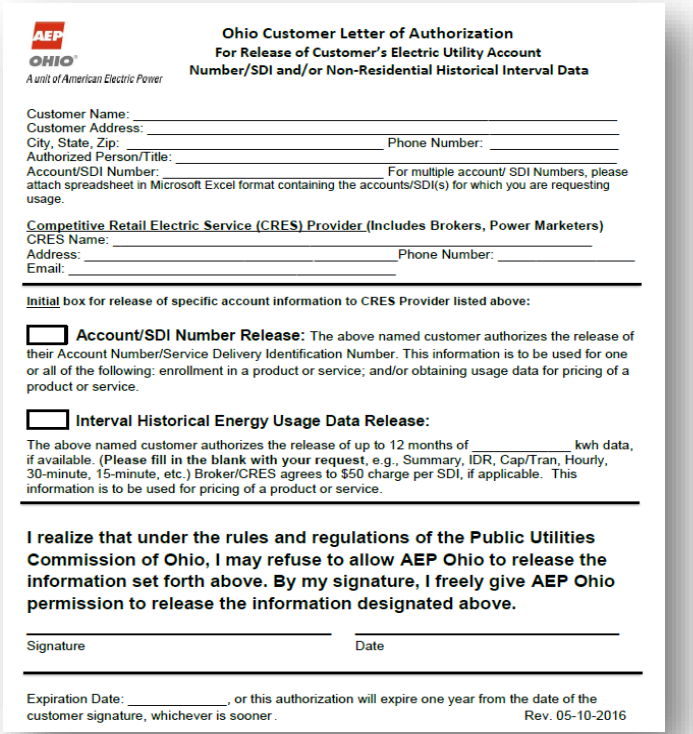
☐ **Residential, Interval Historical Energy Usage Data Release:**
The above named residential customer authorizes the release of up to 24 months of _____ kwh data, if available. **(Please fill in the blank with your request**, e.g., Hourly, 30-minute, 15-minute, etc.) This information is to be used for 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

IDR LOA



AEP OHIO
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: _____

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☐ **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 _____

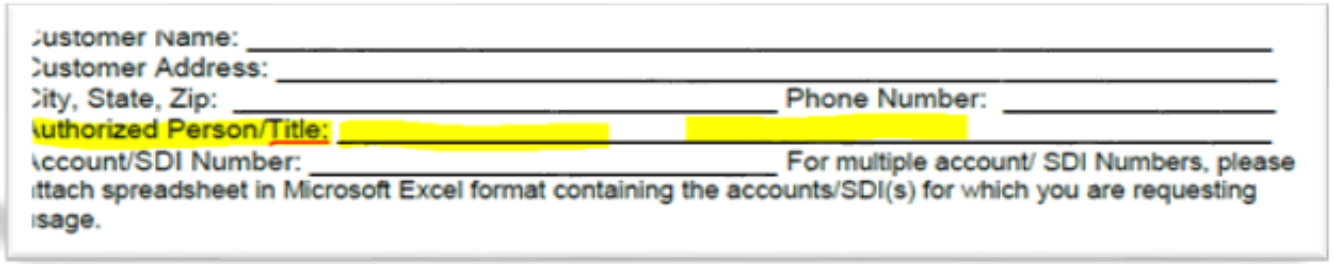
Expiration Date: _____, or this authorization will expire one year from the date of the customer signature, whichever is sooner. Rev. 05-10-2016

AEP Ohio Historical Usage Requests-LOA

Two LOAs

Similarities:

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



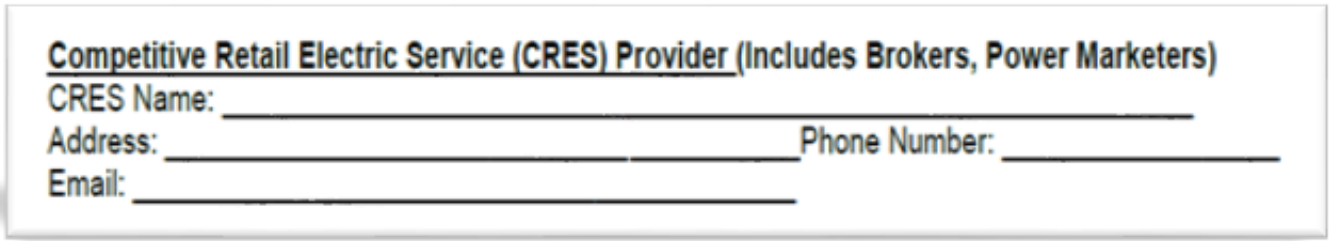
Customer Name: _____

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: _____

Two LOAs

Differences:

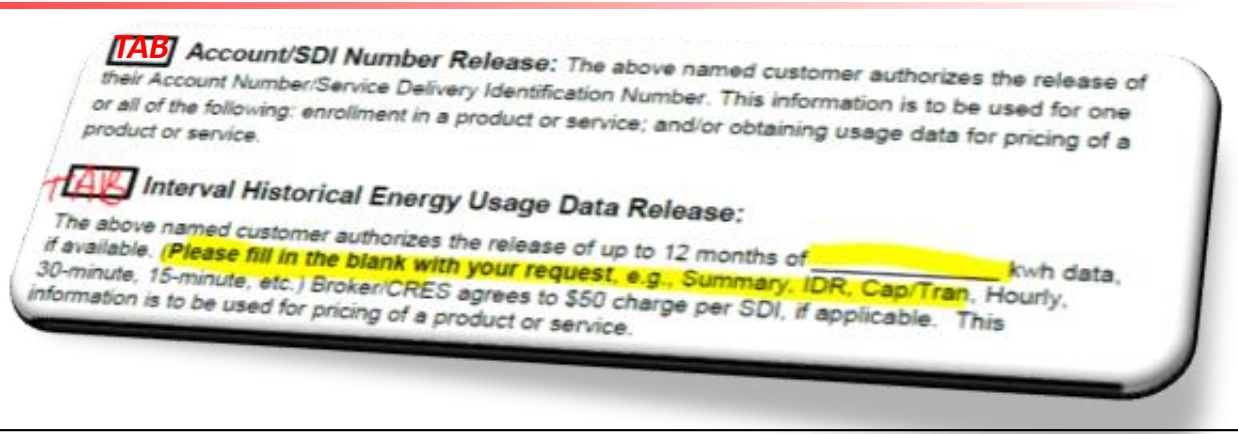
- Non IDR

> ☐ **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.

- IDR Data

> ☐ **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.

Usage Release Boxes

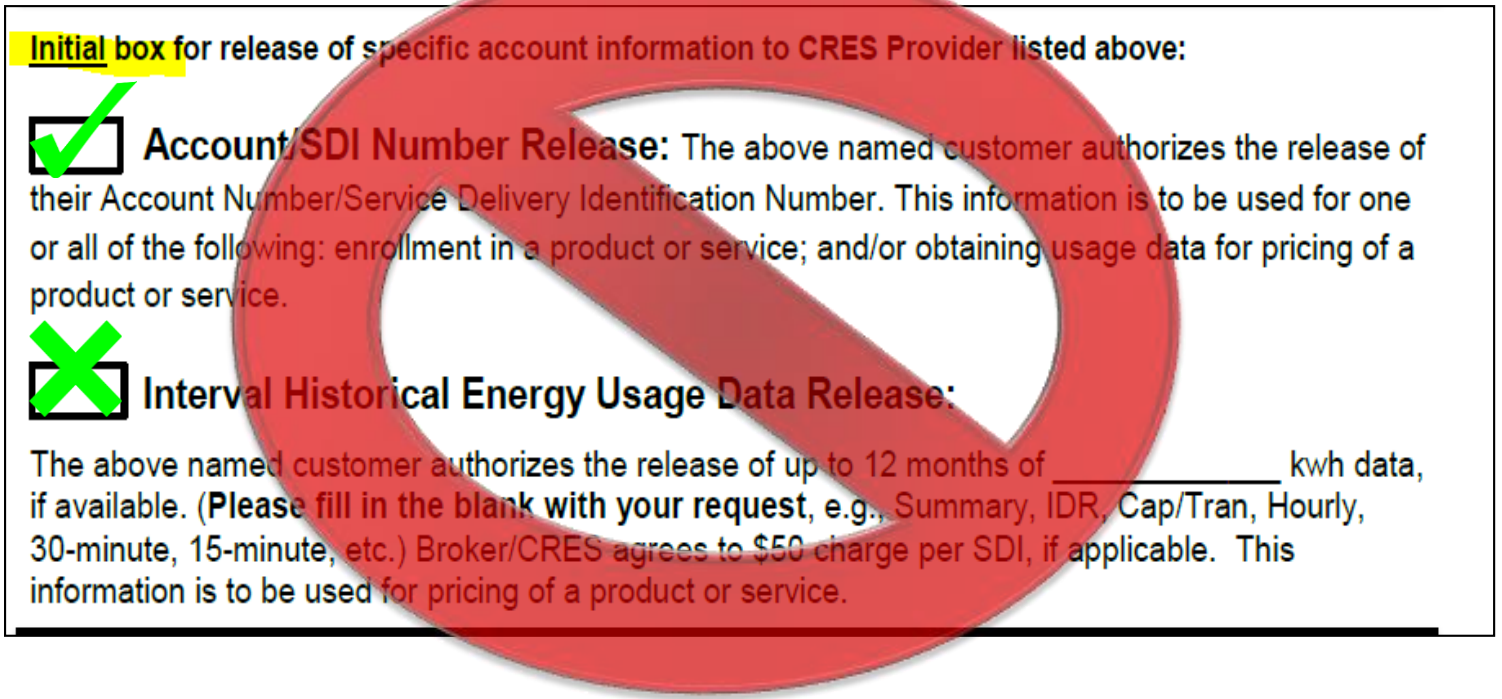


- The first box is the customer's authorization to release their SDI number to the CRES/Broker
- The second box is the authorization to retrieve their account usage data
- Please **FILL IN THE BLANK** with the data you are requesting (summary, IDR, etc.) in the Interval Historical Energy Usage Data Release section

The Business Partner Portal (BPP) is available for you to receive the IDR & Summary data free of charge, 24/7.

Usage Release Boxes

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



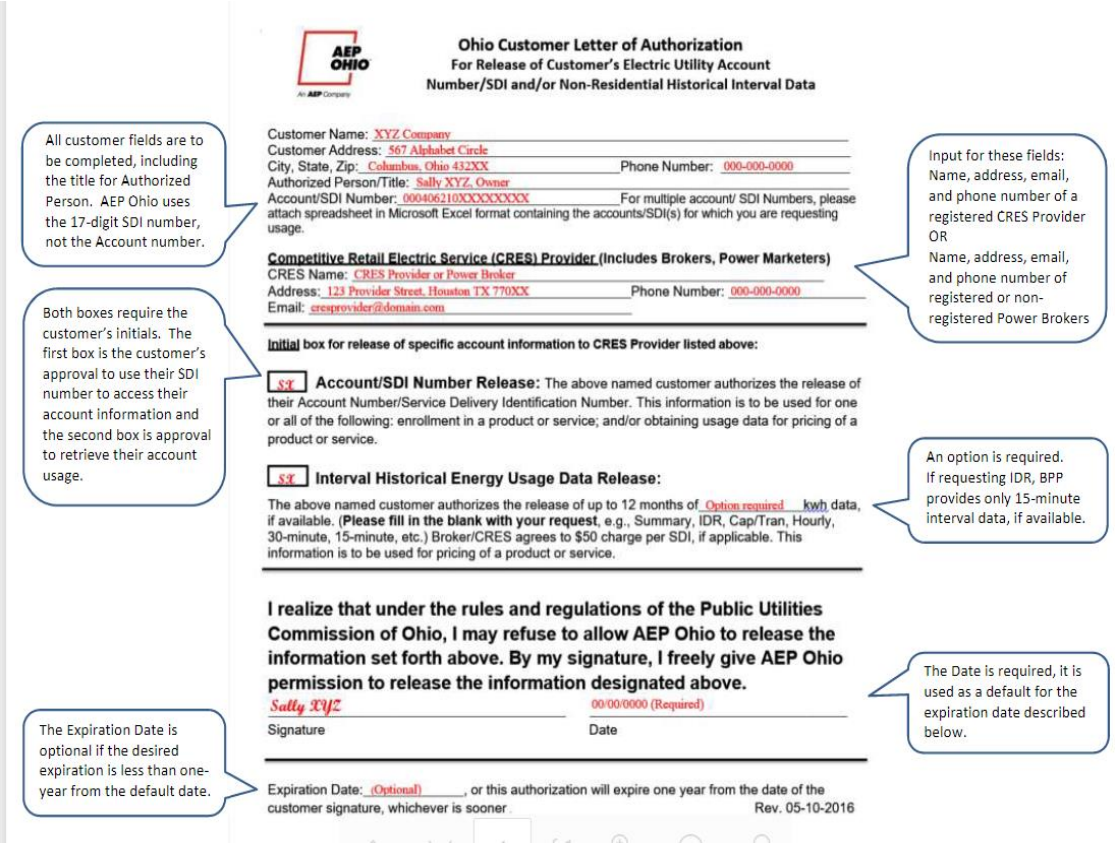
Initial box for release of specific account information to CRES Provider listed above:

☑ **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.

COMPLETED LOA



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

Customer Name: XYZ Company
Customer Address: 567 Alphabet Circle
City, State, Zip: Columbus, Ohio 432XX Phone Number: 000-000-0000
Authorized Person/Title: Sally XYZ, Owner
Account/SDI Number: 000406210XXXXXXXX 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: CRES Provider or Power Broker
Address: 123 Provider Street, Houston TX 770XX Phone Number: 000-000-0000
Email: cresprovider@domain.com

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

SX **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.

SX **Interval Historical Energy Usage Data Release:**

The above named customer authorizes the release of up to 12 months of Option required 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.

Sally XYZ 00/00/0000 (Required)
Signature Date

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

All customer fields are to be completed, including the title for Authorized Person. AEP Ohio uses the 17-digit SDI number, not the Account number.

Input for these fields: Name, address, email, and phone number of a registered CRES Provider OR Name, address, email, and phone number of registered or non-registered Power Brokers

Both boxes require the customer's initials. The first box is the customer's approval to use their SDI number to access their account information and the second box is approval to retrieve their account usage.

An option is required. If requesting IDR, BPP provides only 15-minute interval data, if available.

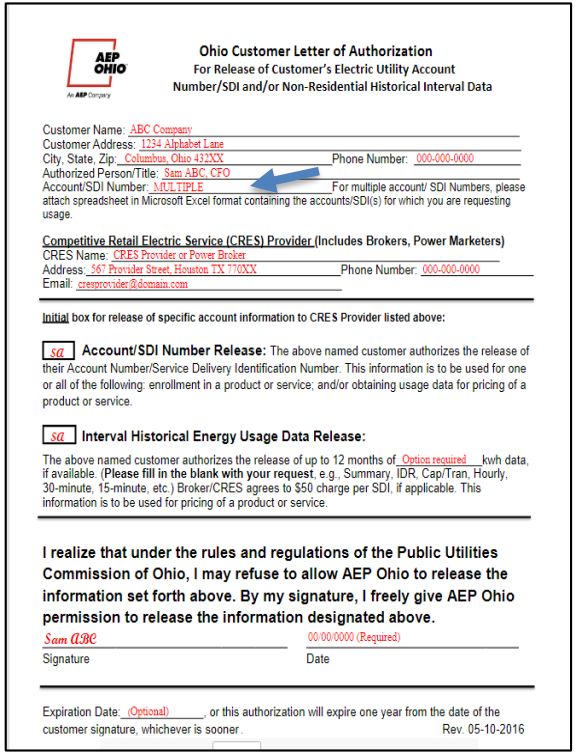
The Date is required, it is used as a default for the expiration date described below.

The Expiration Date is optional if the desired expiration is less than one-year from the default date.

[LOA FAQs]

Multiple SDI request

Page 1 of 2



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

Customer Name: ABC Company
Customer Address: 1234 Alphabet Lane
City, State, Zip: Columbus, Ohio 432XX Phone Number: 000-000-0000
Authorized Person/Title: Sam ABC, CFO
Account/SDI Number: MULTIPLE 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: CRES Provider or Power Broker
Address: 567 Provider Street, Houston TX 770XX Phone Number: 000-000-0000
Email: cresprovider@domain.com

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

[sa] **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.

[sa] **Interval Historical Energy Usage Data Release:**

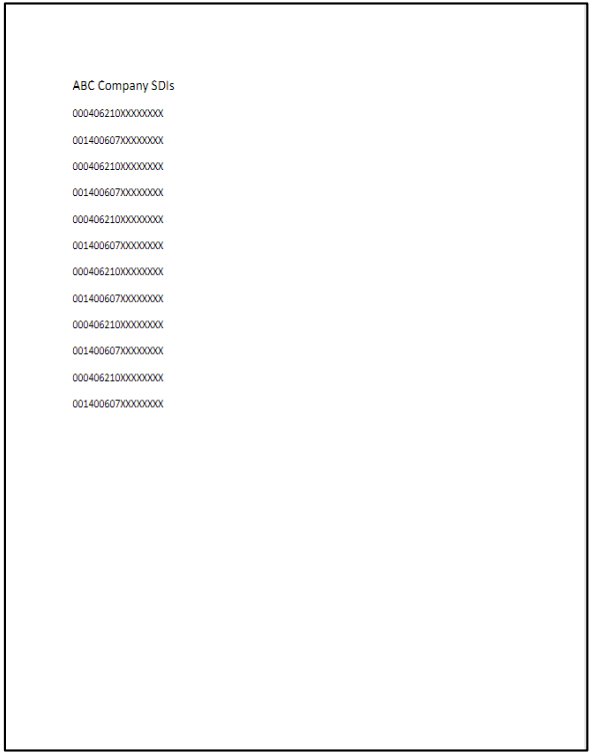
The above named customer authorizes the release of up to 12 months of Option required kwh data, if available. (**Please fill in the blank with your request**, e.g., Summary, IDR, Cap/Tran, Hourly, 30-minute, 15-minute, etc.) Broker/CRES agrees to $50 charge per SDI, if applicable. This information is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

Sam ABC — Signature
00/00/0000 (Required) — Date

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

Page 2 of 2



ABC Company SDIs

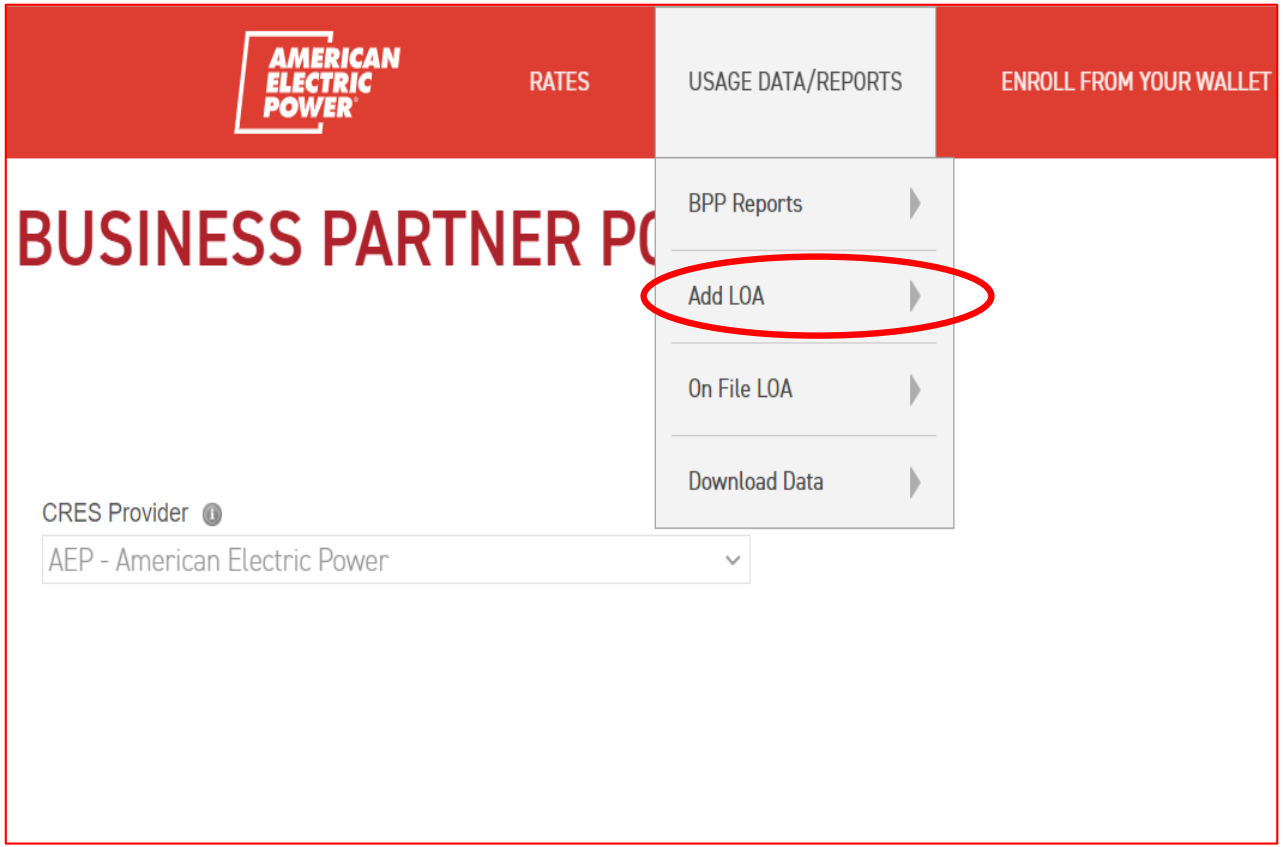
00040621OXXXXXXX
00140060 7XXXXXXX
00040621OXXXXXXX
00140060 7XXXXXXX
00040621OXXXXXXX
00140060 7XXXXXXX
00040621OXXXXXXX
00140060 7XXXXXXX
00040621OXXXXXXX
00140060 7XXXXXXX
00040621OXXXXXXX
00140060 7XXXXXXX

BPP LOA Features

- Upload LOA for an SDI number
  - Active for a year within BPP
- View your company's LOAs on file
  - Any LOA uploaded is visible by your employees
- Terminate any LOA on file
  - Bad LOA loaded? Terminate and upload a new one

BPP Add LOA

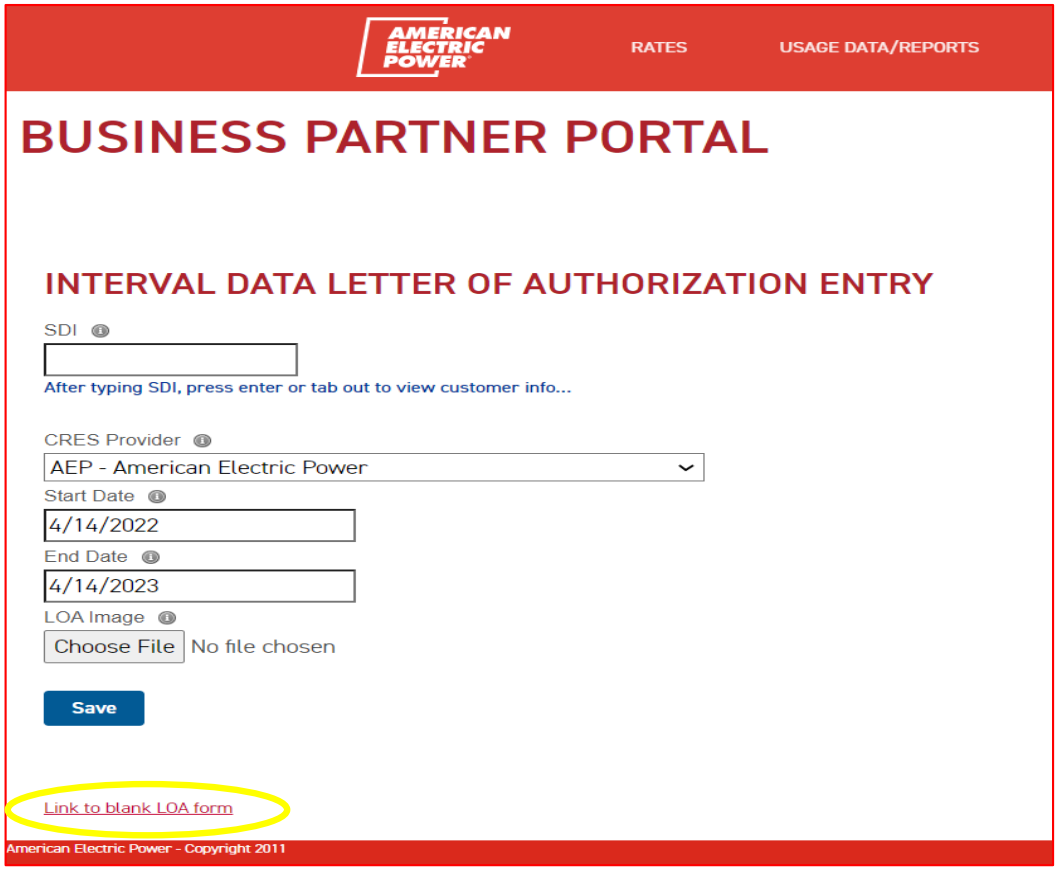
CRES Users can “Add” an LOA to BPP for their registered company



BPP Add LOA

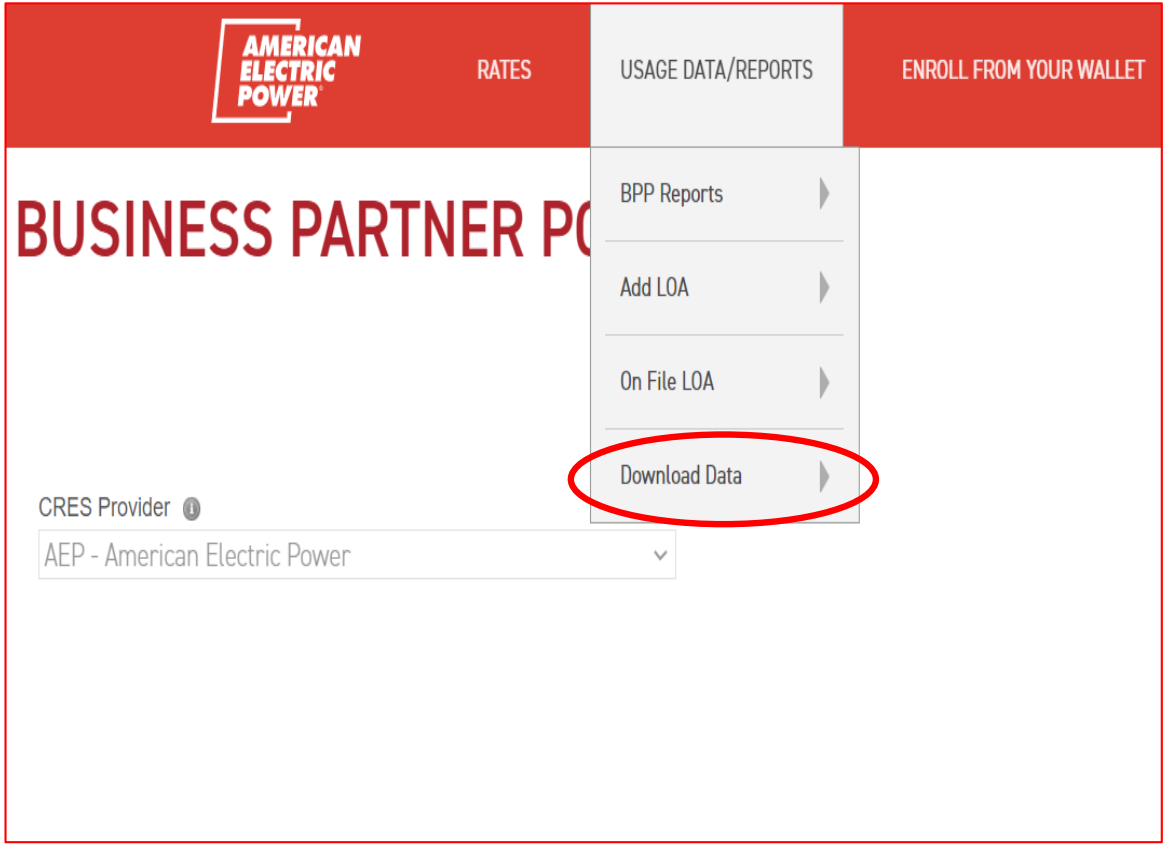
Insert the specific customer's SDI number.

LOA's Effective Dates for BPP



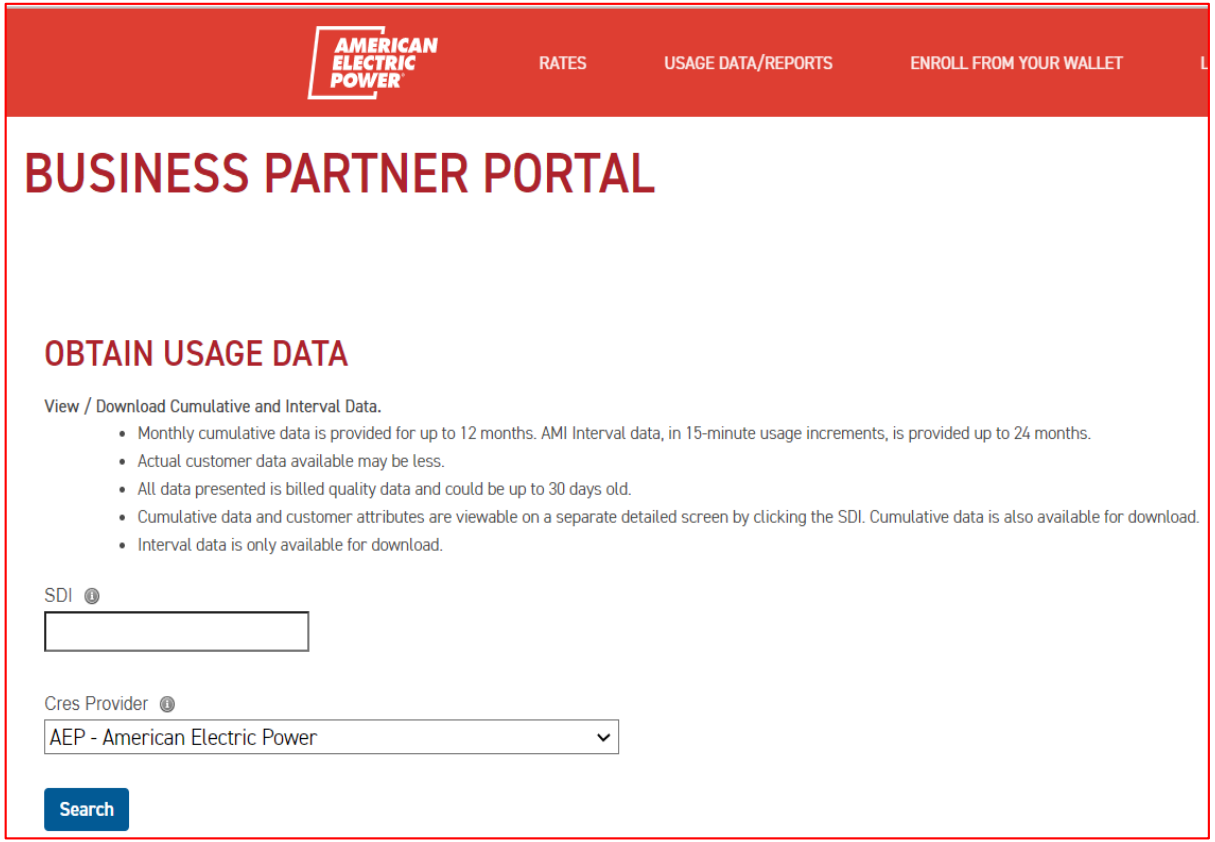
BPP Download Data

Retrieve Customer Data

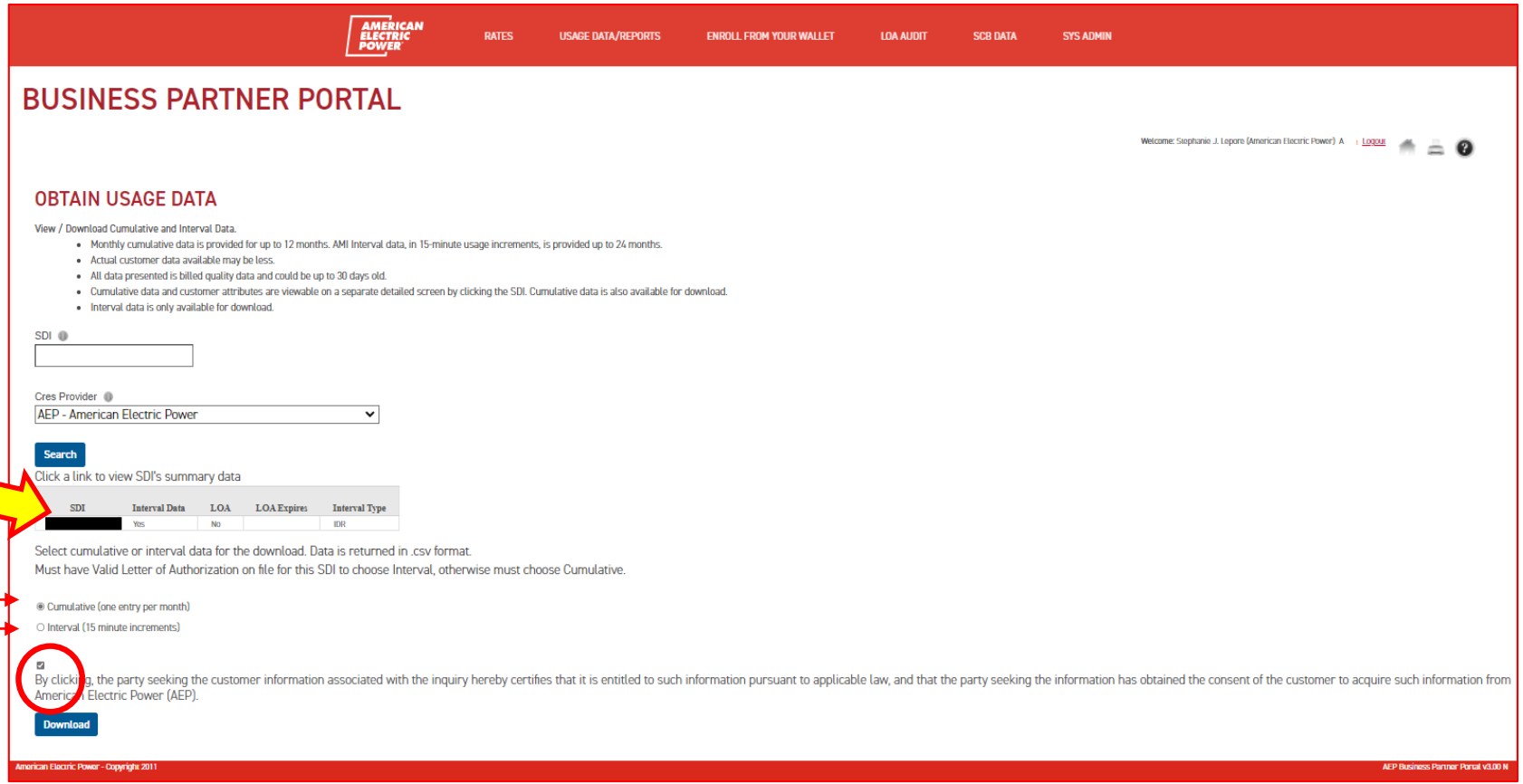


BPP Download Data

Insert the specific customer's SDI number.

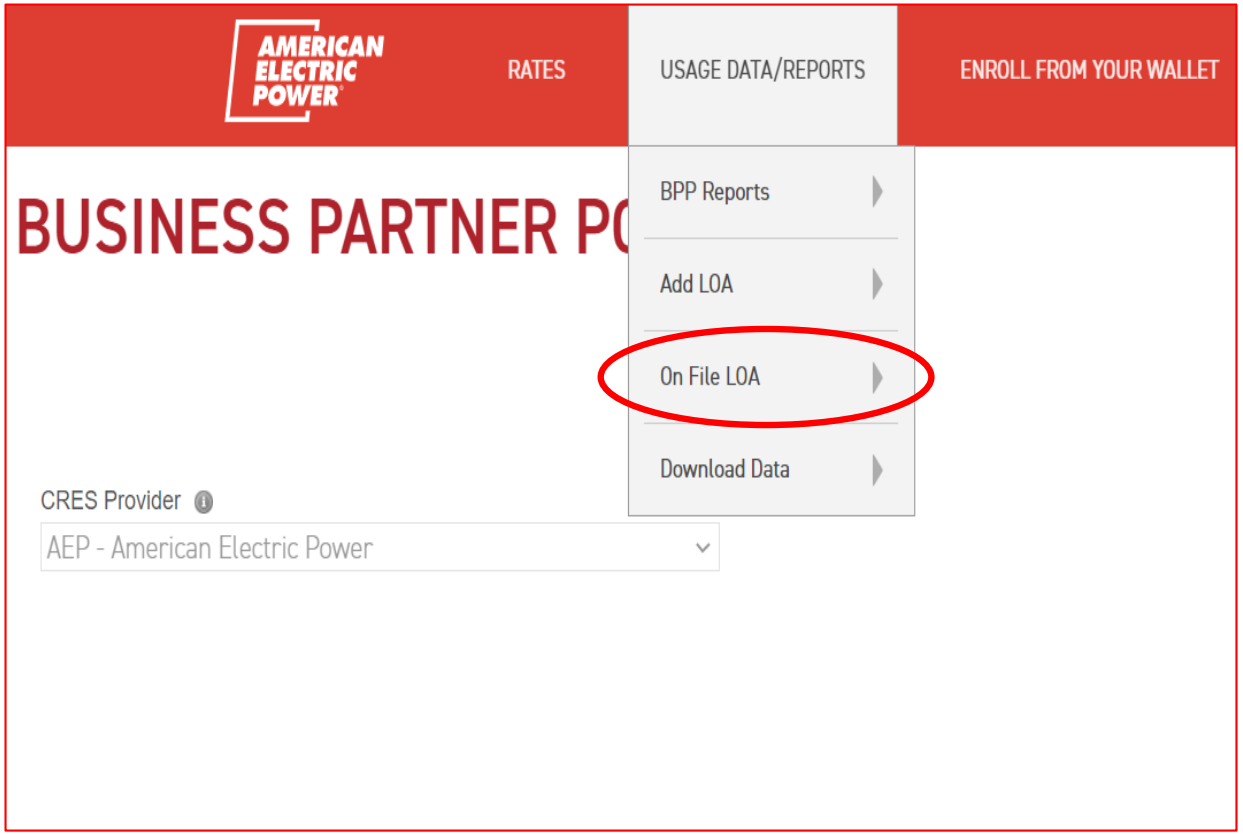


BPP Download Data



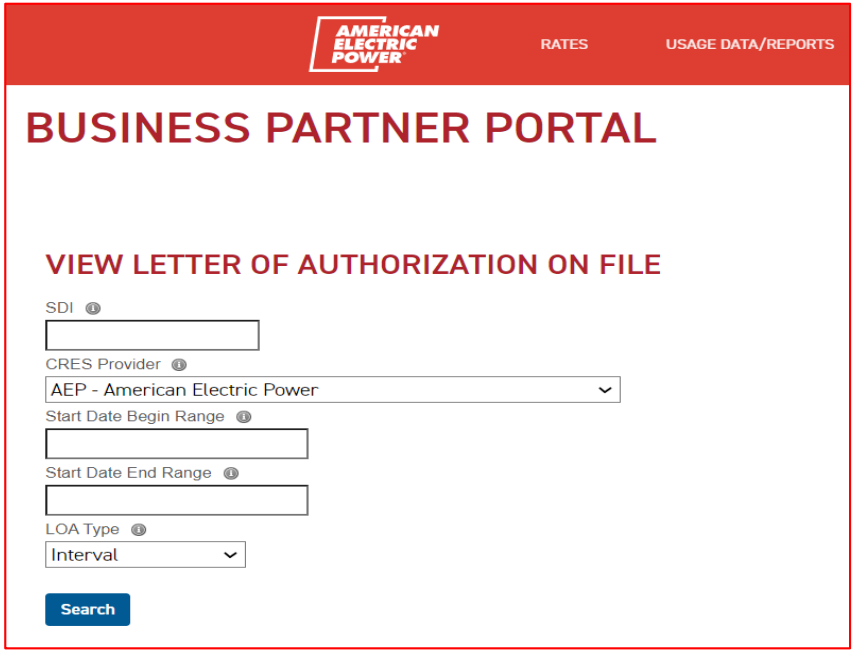
BPP LOA On File

CRES Users can “Search” any LOA in BPP for their registered company



BPP LOA On File

- SDI to search a specific LOA
- Blank to search everything
- Interval or Enroll from Wallet



SUCCESS: A LOA FOR THESE LISTED SDIS HAVE BEEN FOUND

SDI	Customer Name	Service Address	Entry	Start	End	Provider	Provider Display	Performed By	LOA Image	
001400607[redacted]	[redacted]	[redacted]	3/15/2021	10/19/2021	10/19/2022	[redacted]	[redacted]	Han Solo	View	Edit
001400607[redacted]	[redacted]	[redacted]	3/15/2021	10/20/2021	10/20/2022	[redacted]	[redacted]	Han Solo	View	Edit

BPP Terminate LOA

SUCCESS: A LOA FOR THESE LISTED SDIS HAVE BEEN FOUND

SDI	Customer Name	Service Address	Entry	Start	End	Provider	Provider Display	Performed By	LOA Image	
00140060[redacted]	[redacted]	[redacted]	3/15/2021	10/19/2021	10/19/2022	[redacted]	[redacted]	Han Solo	View	Edit
00140060[redacted]	[redacted]	[redacted]	3/15/2021	10/20/2021	10/20/2022	[redacted]	[redacted]	Han Solo	View	Edit

INTERVAL DATA LETTER OF AUTHORIZATION EDIT / TERMINATE

SDI
00140060[redacted]

CRES Provider
AEP - American Electric Power

Start Date
10/19/2021

End Date
10/19/2022

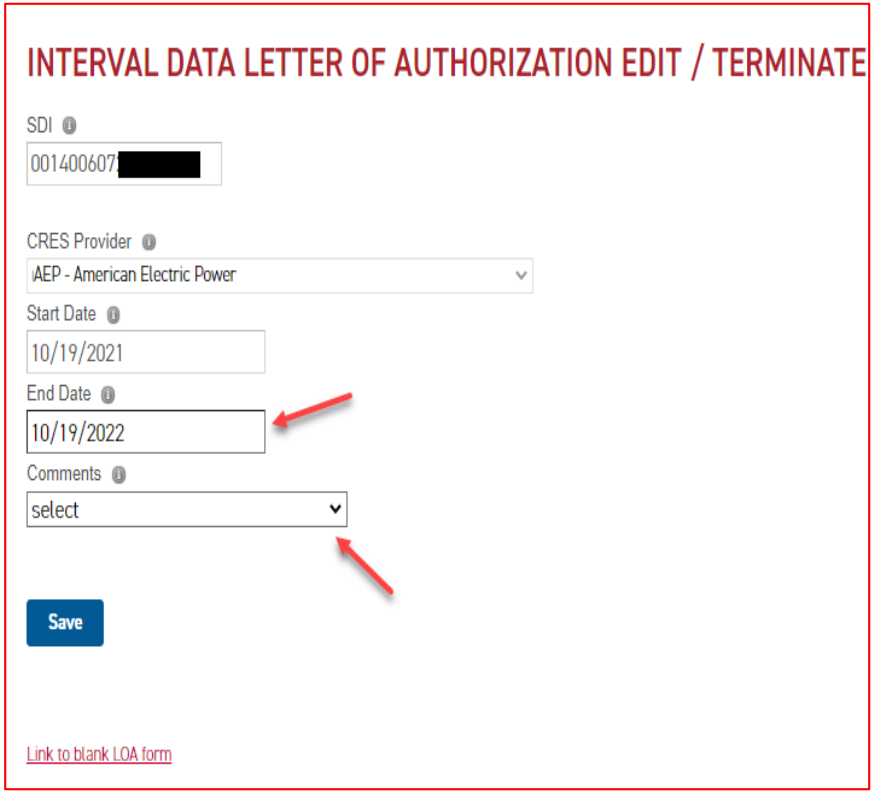
Comments
select

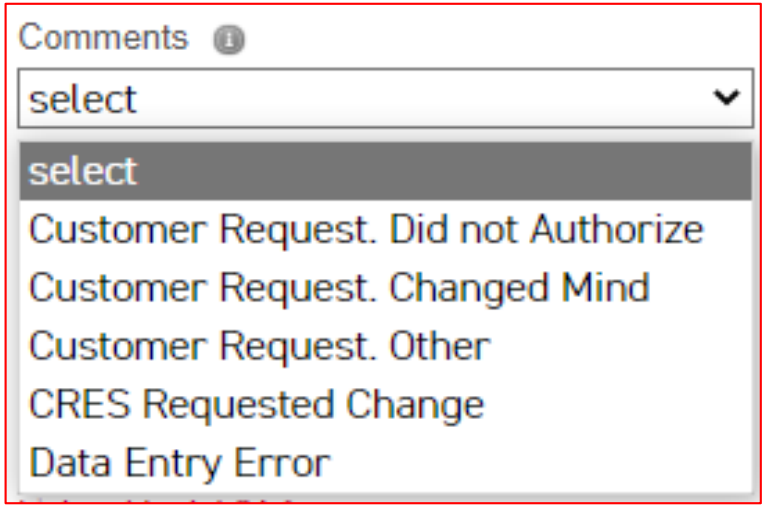
Save

Link to blank LOA form

- "EDIT" will terminate an LOA
  - Start date is not changed
  - End date as of current date

BPP Terminate LOA





- Select a reason to terminate
- Save
- Upload new LOA

LOA Audits

- With PUCO Staff's direction, we require audits to confirm LOAs are received and completed properly
- In 2019, our first audit was completed
- If the effective dates of the LOA fall within the time period being audited, it is considered an "active" LOA and can be selected

LOA Audits

- Performed AT LEAST once year
- Not performed within 30 days of the previous audit
- The time period covered during an audit will not overlap a previous audit period
- AEP Ohio LOAs completed incorrectly will fail audit

LOA Audits

IDR Access Consequences

- 1st failed audit:
  - suspension from BPP for 30 days
- 2nd failed audit:
  - suspension from BPP for 90 days
- 3rd failed audit:
  - suspension from BPP for 1 year

Only the IDR download capabilities will be suspended for the entire CRES

Summary

- BPP is free - 24/7 for summary and IDR data
- Complete the LOA in its entirety, including the CRES/Broker section
- The **customer** must **initial** the usage release boxes
  - **Not** someone from the CRES and/or Broker
- If the LOA is for *multiple* SDIs, write “multiple” on the account number/SDI line in section 1
  - Multiple SDI numbers go on an additional page (uploaded along with the LOA in one submission)
- The CRES Provider assumes responsibility for any LOA uploaded on behalf of their company

AMERICAN ELECTRIC POWER
BOUNDLESS ENERGY™

Thank you!

Questions?

Email: *ohiochoiceoperation@aep.com*

Checkout our LOA FAQs on AEP Ohio's CRES provider Page