



# 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

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## 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

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

# Why this LOA

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- 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: \_\_\_\_\_

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**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.

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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 \_\_\_\_\_

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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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**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.

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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

# 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.

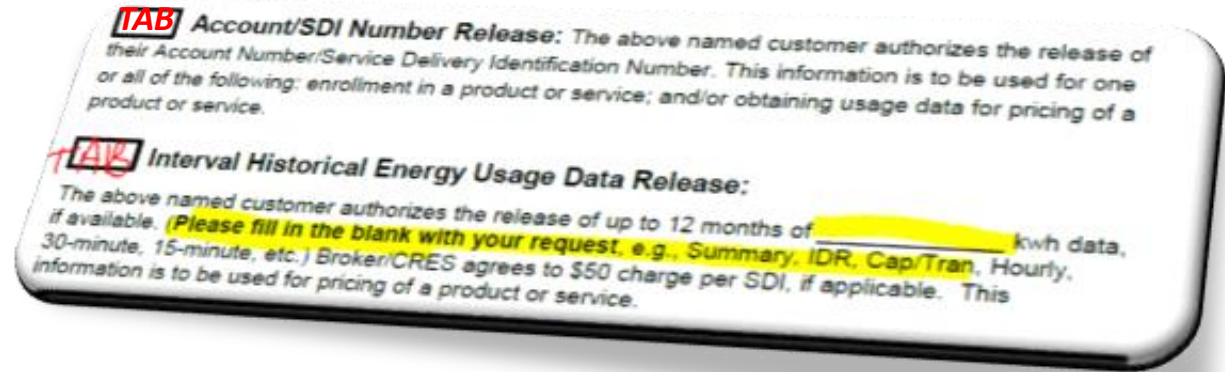
- IDR Data

**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: 000406210XXXXXXX 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:

**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 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.

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.

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

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

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.



# BPP LOA Features

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- 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

The screenshot displays the American Electric Power (AEP) website interface. At the top, there is a navigation bar with the AEP logo on the left, and three menu items: 'RATES', 'USAGE DATA/REPORTS', and 'ENROLL FROM YOUR WALLET'. Below the navigation bar, the main content area features the heading 'BUSINESS PARTNER PORTAL'. A dropdown menu is open under 'USAGE DATA/REPORTS', listing four options: 'BPP Reports', 'Add LOA', 'On File LOA', and 'Download Data'. The 'Add LOA' option is circled in red. Below the dropdown menu, there is a section labeled 'CRES Provider' with a dropdown menu currently set to 'AEP - American Electric Power'.

# BPP Add LOA

Insert the specific customer's SDI number.

LOA's Effective Dates for BPP

**AMERICAN  
ELECTRIC  
POWER** RATES USAGE DATA/REPORTS

## BUSINESS PARTNER PORTAL

### INTERVAL DATA LETTER OF AUTHORIZATION ENTRY

SDI ⓘ  
  
After typing SDI, press enter or tab out to view customer info...

CRES Provider ⓘ  
AEP - American Electric Power ▼

Start Date ⓘ

End Date ⓘ

LOA Image ⓘ  
 No file chosen

[Link to blank LOA form](#)

American Electric Power - Copyright 2011

# BPP Download Data


Retrieve  
Customer Data

The screenshot displays the American Electric Power Business Partner Portal interface. At the top, there is a red navigation bar with the AEP logo on the left, and three menu items: 'RATES', 'USAGE DATA/REPORTS', and 'ENROLL FROM YOUR WALLET'. Below the navigation bar, the main content area features the heading 'BUSINESS PARTNER PORTAL'. A dropdown menu is open under 'USAGE DATA/REPORTS', listing 'BPP Reports', 'Add LOA', 'On File LOA', and 'Download Data'. The 'Download Data' option is circled in red. Below the menu, there is a 'CRES Provider' dropdown menu with 'AEP - American Electric Power' selected.



# BPP Download Data

Insert the  
specific  
customer's  
SDI number.



RATES      USAGE DATA/REPORTS      ENROLL FROM YOUR WALLET

## BUSINESS PARTNER PORTAL

### OBTAIN USAGE DATA

View / Download Cumulative and Interval Data.

- Monthly cumulative data is provided for up to 12 months. AMI Interval data, in 15-minute usage increments, is provided up to 24 months.
- Actual customer data available may be less.
- All data presented is billed quality data and could be up to 30 days old.
- Cumulative data and customer attributes are viewable on a separate detailed screen by clicking the SDI. Cumulative data is also available for download.
- Interval data is only available for download.

SDI ⓘ




Cres Provider ⓘ

AEP - American Electric Power ▼

**Search**

# BPP Download Data

## BUSINESS PARTNER PORTAL

Welcome: Stephanie J. Lapore (American Electric Power) A | [Logout](#)   


### OBTAIN USAGE DATA

View / Download Cumulative and Interval Data.

- Monthly cumulative data is provided for up to 12 months. AMI Interval data, in 15-minute usage increments, is provided up to 24 months.
- Actual customer data available may be less.
- All data presented is billed quality data and could be up to 30 days old.
- Cumulative data and customer attributes are viewable on a separate detailed screen by clicking the SDI. Cumulative data is also available for download.
- Interval data is only available for download.

SDI 

Cres Provider 

AEP - American Electric Power 

Search

Click a link to view SDI's summary data

SDI	Interval Data	LOA	LOA Expires	Interval Type
	Yes	No		IR

Select cumulative or interval data for the download. Data is returned in .csv format.

Must have Valid Letter of Authorization on file for this SDI to choose Interval, otherwise must choose Cumulative.

Cumulative (one entry per month)

Interval (15 minute increments)

By clicking, the party seeking the customer information associated with the inquiry hereby certifies that it is entitled to such information pursuant to applicable law, and that the party seeking the information has obtained the consent of the customer to acquire such information from American Electric Power (AEP).

Download

# BPP LOA On File

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

**AMERICAN  
ELECTRIC  
POWER**

RATES

USAGE DATA/REPORTS

ENROLL FROM YOUR WALLET

## BUSINESS PARTNER PORTAL

- BPP Reports
- Add LOA
- On File LOA**
- Download Data

CRES Provider ⓘ

AEP - American Electric Power

# BPP LOA On File

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

RATES    USAGE DATA/REPORTS

## BUSINESS PARTNER PORTAL

VIEW LETTER OF AUTHORIZATION ON FILE

SDI ⓘ

CRES Provider ⓘ

Start Date Begin Range ⓘ

Start Date End Range ⓘ

LOA Type ⓘ

[Search](#)

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	<a href="#">View</a> <a href="#">Edit</a>
001400607 [REDACTED]	[REDACTED]	[REDACTED]	3/15/2021	10/20/2021	10/20/2022	[REDACTED]	[REDACTED]	Han Solo	<a href="#">View</a> <a href="#">Edit</a>

# 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	
001400607 [REDACTED]	[REDACTED]	[REDACTED]	3/15/2021	10/19/2021	10/19/2022	[REDACTED]	[REDACTED]	Han Solo	<a href="#">View</a>	<a href="#">Edit</a>
001400607 [REDACTED]	[REDACTED]	[REDACTED]	3/15/2021	10/20/2021	10/20/2022	[REDACTED]	[REDACTED]	Han Solo	<a href="#">View</a>	<a href="#">Edit</a>

## INTERVAL DATA LETTER OF AUTHORIZATION EDIT / TERMINATE

SDI ⓘ  
001400607 [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

## INTERVAL DATA LETTER OF AUTHORIZATION EDIT / TERMINATE

SDI ⓘ

001400607 [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](#)

Comments ⓘ

select

select

Customer Request. Did not Authorize

Customer Request. Changed Mind

Customer Request. Other

CRES Requested Change

Data Entry Error

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

# LOA Audits

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- 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

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- 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

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

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

# Summary

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- 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

*Thank you!*

# Questions?

Email: [ohiochoiceoperation@aep.com](mailto:ohiochoiceoperation@aep.com)

Checkout our [LOA FAQs](#) on AEP Ohio's CRES provider Page