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BY EMAIL AND WEB POSTING

November 21, 2022

**TO: All Licensed Electricity Distributors
All Natural Gas Distributors
All Other Interested Stakeholders**

**RE: Publication of the Green Button Industry-Led Working Group Report and
Update on Green Button Implementation – OEB File No. EB-2021-0183**

Today, the Ontario Energy Board (OEB) posted a report it received from the Green Button Industry-Led Working Group (GB IWG) related to the implementation of the Green Button data standard in Ontario. The [GB IWG Report](#) (the Report) provides useful information to electricity and natural gas distributors (collectively, distributors) on issues relevant to the implementation of the Green Button data standard, which they are required to complete by November 1, 2023.¹

This letter provides OEB staff's response to the Report, including certain clarifications to help ensure that Green Button is implemented in a manner that protects the public, supports innovation in the energy sector and delivers value to consumers.

The guidance issued by the OEB on November 1, 2021 ([the Guidance Letter](#))² helped to ensure that distributors were well-positioned to implement Green Button consistent with the [Green Button Regulation](#). The work of the GB IWG through 2022 and collected in the Report further assists distributors through the implementation period, which began November 1, 2021 and ends on November 1, 2023.

GB IWG Report

On November 17, 2021, at the request of stakeholders, OEB staff issued a [letter](#) establishing the GB IWG to address issues that arise as distributors go through the process of implementing Green Button in accordance with the Green Button Regulation.

¹ Per Ontario Regulation 633/21 "Energy Data" (The Green Button Regulation)

² The Guidance Letter was itself issued for consultation in draft form on October 12, 2021 (EB-2021-0183)

The GB IWG is a voluntary and industry-led initiative, encompassing 21 distributors and 26 other participants including distributor representative groups, IT service providers, consumer groups and other interested stakeholders. The Report represents the culmination of the group's work through 2022.

The Report includes information that Ontario distributors implementing Green Button will benefit from reviewing, such as:

- detailed information related to Ontario's implementation of Green Button through a series of FAQs
- technical detail related to the application of energy data on Ontario electricity bills to how it appears in the NAESB ESPI³ standard via a mapping section, and
- recommendations⁴ to distributors related to customer authorization processes, user experience and what qualifies as "energy data" under the Green Button Regulation.

The information in the Report complements OEB staff's guidance letter issued on November 1, 2021.

OEB staff commends the GB IWG for their work in putting together the Report, which involved dedication of time and resources from all members. While OEB staff is generally supportive of the Report's recommendations and believe their application will benefit customers who wish to use Green Button, there are some areas that require further comment. These are set out below.

OEB staff comments on the GB IWG Report

Energy Data to be Made Available Via Green Button

In the Guidance Letter, OEB staff advised that it expects the GB IWG to continue engagement in the area of the energy data to be made available in Green Button format. In its meetings, the GB IWG dedicated significant time to considering what information must be made available in Green Button format under the Green Button Regulation.

The Report includes as a "general principle" that "the information to be made available is information identified in the NAESB ESPI standard, and where the utility is the

³ North American Energy Standards Board (**NAESB**) Energy Services Provider Interface (**ESPI**)

⁴ The Report recommends that distributors implement these recommendations where possible "without undue burden or interfering with their other legislative/regulatory responsibilities, or where it does not contradict other Utility best practices." Of the recommendations, 23 had full consensus of the GB IWG, and three did not.

authoritative source of the data that is collected and made available to customers in the normal course of its operations.”

OEB staff notes that the Green Button Regulation does not include the qualifier “where the utility is the authoritative source of the data.” Rather, distributors must ensure that where they are not planning to make certain data available in Green Button format, they are complying with the Green Button Regulation that requires them to make “energy data” available. Section 1(1) of the Green Button Regulation further defines “energy data” as “... any energy usage and account holder information identified in REQ.21.2.5t or REQ.21.2.6t in the NAESB ESPI standard that is collected by the energy provider and made available to account holders in the normal course of the energy provider’s operations, excluding any data collected in respect of projects that are being undertaken on a trial basis.”

The Report also includes a reference to electricity consumption being reported per Section 11.3 of the Retail Settlement Code. Distributors implementing Green Button should note the Green Button Regulation includes the requirement to make energy usage information for interval periods of one hour or less, subject to any limitations of the energy provider’s metering infrastructure.

User Experience: Categorization of Data

The Report includes a recommendation that the presentation of data elements to customers in the customer authorization forms be categorized as follows:

“Electric/Gas Usage”

“Billing”

“Account information, which contains personally identifiable information”⁵

While the Guidance Letter and Green Button Regulation refer to two categories of the data (i.e., energy usage and account information), OEB staff supports providing customers with the additional category of “Billing” for clarity reasons, as long as it is clear to the customer what is meant by each category and the data fits within the definition of “energy data” set out in section 1(1) of the Green Button Regulation. To be clear, this is an option for distributors and not in OEB staff’s view an expectation.

⁵ There would also be a “?” icon beside each named item with further information. The Report also notes that only the information requested by the third party will appear (e.g., if Billing is not requested, it will not appear).

User Experience: Distributor Performance and Communication with Third Parties

The Report includes a recommendation that requests for historical data be processed by distributors as soon as possible based on current processing load, suggesting that distributors should aim to respond in near real-time to data requests by third parties or within a few hours if during peak time.

The Report also recommends that distributors should notify external parties of regularly scheduled maintenance windows that would impact the availability of data.

While the Green Button Regulation does not set specific requirements for the user experience of customers or third parties using Green Button, OEB staff expects distributors to consider system performance when designing their Green Button implementation to ensure customers' and third parties' access to the data is not unduly hampered by poor availability/system performance.

User Experience: Termination of Third-Party Data Flows

The Report includes a recommendation that distributors prevent inadvertent termination of data flows due to meter changeouts and account number changes related to system upgrades.⁶ The Report states that commercial customers have already experienced revocations of data sharing without their prior knowledge, and that customers want to ensure that data sharing is as seamless as possible through CIS upgrades and in the case of distributor mergers.

According to the Report, distributors in the GB IWG advised that it is not always technically possible to ensure the seamless sharing of data through merger processes.

While OEB staff recognize that the process of distributor mergers is complex, the Green Button Regulation requires distributors to share data with a third party once a customer authorizes it to be shared. The Guidance Letter also states that the third party must continue to have access to the customer's data until such time that the customer revokes the authorization (absent a distributor terminating the third party's access due to a significant violation of the terms and conditions under which access to the energy data was provided).

Therefore, OEB staff expects all distributors, including those that may have plans for future mergers or system upgrades, to work to ensure that access to data remains in effect, consistent with the requirements in the Green Button Regulation.

⁶ This recommendation did not achieve consensus within GB IWG but is included in the Report for consideration, and guidance is requested from the OEB.

Customer Authentication and Authorization: Alternate Pathways

The Report includes a recommendation related to distributors' implementation of alternate authentication and authorization pathways for customers without online access to their energy usage and account information. It also notes that some commercial customers may wish to be provided with offline (e.g., hard copy) authorization pathways.

The Report suggests that telephone or paper methods could be made available based on customer type following standard distributor practices (e.g., distributors may prescribe paper forms for large commercial customers but support telephone authorizations for residential customers).

OEB staff's view is that customers who wish to access their data or authorize a third party to access their data should be able to do so consistent with the Green Button Regulation. As stated in the Guidance Letter, distributors need to consider alternate authentication approaches to allow customers without an online account with the distributor to participate in Green Button.

As suggested in the Report, should the GB IWG wish to continue to meet, establishing a uniform approach to such alternate pathways may be an area it wishes to focus on.

Customer Authentication and Authorization: Larger Customers

The Report includes a recommendation that, to support large, multi-site customers, distributors should accept a standardized letter of authorization so that customers can fill out a single form and send it to multiple distributors for processing.⁷

The GB IWG also identified the area of "bulk authorizations" as important to large, multi-site organizations (e.g., banks, school boards, retail chains) with hundreds of meters that have an interest in tracking their energy consumption.

The Green Button Regulation requires the account holder to authorize the sharing of data associated with a particular account. As stated in the Guidance Letter, OEB staff encourages distributors to consider the feasibility of allowing for a single authorization across multiple accounts where the account holder is the same.

OEB staff encourages distributors and industry to continue to work on a cost-effective and secure solution that meets the needs of larger customers with respect to bulk

⁷ This recommendation did not achieve consensus within the GB IWG.

authorization while also ensuring the solution meets the requirements of the Green Button Regulation in relation to the account holder needing to authorize sharing of data.

Third-Party Access: Process for Bad Actors and Notifications

The Report includes a recommendation to establish a standard notification process whereby distributors would be responsible for notifying a third party and/or customers in relation to potential and actual violation of the terms and conditions between a third party and a distributor. The GB IWG envisions increasing levels of notification to the third party, customers and potentially the OEB, depending on whether a violation of terms and conditions are “suspected,” “verified” or “confirmed.”

Distributors agreed that the expectations related to notification seem logical but that each distributor requires flexibility to establish its own processes based on its own legal advice and operating procedures where a third party may have violated terms and conditions.

OEB staff’s guidance remains that it would generally not be a distributor’s role to monitor the behaviour of a third party once the customer agrees to share their data with the third party. While the OEB does not have regulatory oversight of third parties, issues that may arise regarding termination of authorization may be raised through the OEB’s existing complaints resolution and industry relations enquiry processes.

In its Guidance Letter, OEB staff also advised that the GB IWG may be a suitable forum for further discussion on what may constitute a “significant violation” as set out in the Green Button Regulation. The Report does not appear to have dealt with this issue.

GB IWG Further Meetings

OEB staff will continue to work with GB IWG members in relation to potential future meetings, as desired by the group.

As the GB IWG is an independent group, OEB staff is happy for the facilitation of future meetings to be managed via the GB IWG. OEB staff will be reaching out to the GB IWG Co-Leads this month to gauge interest on proceeding with meetings from December onwards.

Monitoring Progress toward Implementation of Green Button

OEB staff acknowledges the quarterly reporting via the [Green Button Implementation Distributor Progress Report](#) that distributors have completed to date. While some distributors have already implemented, or are close to implementing, Green Button, the

majority of distributors have indicated they expect to complete Green Button implementation in either the second or third quarters of 2023.

OEB staff will continue to monitor distributor progress towards Green Button implementation throughout 2023. As the implementation date gets closer, OEB staff expects to make changes to the reporting to provide greater awareness of distributors' progress in order to identify any potential areas of concern.

Finally, with the Guidance Letter issued on November 1, 2021, and the additional information to support progress provided via the GB IWG throughout 2022 and this Report, OEB staff do not believe that distributors have any barriers to implement Green Button by the November 1, 2023, deadline set out in the Green Button Regulation. OEB staff remains available to the GB IWG and all stakeholders interested in the implementation of Green Button, or with questions regarding this letter, may contact us at the Industry Relations email (Industry.Relations@oeb.ca).

Yours truly,

Brian Hewson
Vice President, Consumer Protection & Industry Performance