



November 1, 2021

## OEB Staff Guidance Regarding Implementation of Green Button

### ***Energy Data to be Made Available***

Ontario Regulation 633/21 under the *Electricity Act, 1998* (Green Button Regulation) requires a distributor<sup>1</sup> to make available energy usage and account information identified in the NAESB ESPI standard that the distributor currently collects and makes available to customers in the normal course of the distributor's operations. Energy usage information must be provided for intervals of one hour or less and at least 24 months of usage data must be made available (unless the customer has not held an account with the distributor for that long).

OEB staff's view is that the "normal course" includes, at a minimum, all usage and account information that is included on a customer's bill or accessible through a customer's online account. The following tables include data elements for electricity (Table 1) and natural gas (Table 2) that OEB staff, with input from the GB Task Force, understood would generally be available in the "normal course" and therefore required to be provided under Green Button.

**Table 1: Energy Usage and Account Information: Electricity**

Customer Energy Usage Information	Customer Account Information
Universal Unique Identifier (GB identifier to match data streams)	Universal Unique Identifier (GB Identifier to match data streams)
Previous read & current read - dates and meter readings (plus clear identifier of unit of measure included in GB standard)	Meter number

<sup>1</sup> The obligation to make energy data available under section 25.35.8 of the *Electricity Act, 1998* applies to "energy providers", which is defined in the Green Button Regulation as including most electricity and natural gas distributors.

Current reading type (e.g., actual/estimate) and quality of reading and any additional information on reading type	Account number/premise number
Billing period – start/end dates and times (bill type – adjusted/final)	Account name
Overall consumption for period (plus historical usage summary)	Service address
Overall consumption, last billing period	Mailing address
Data by hourly interval (or less) with associated cost per kWh (TOU or Tiered) / kW	Customer contact information
Total bill amount for period / add equal billing payment plan	Customer rate class
Global Adjustment (Class A, Class B, retailer customer)	Information necessary to participate in DR / other programs (PEF factor for Class A customers)
Delivery charges (broken out by fixed and volumetric where possible)	TOU / Tier or Class A/B or GS<50/GS>50
Regulatory charges (broken out by item where possible)	Gross-load billing information
Rate riders if delivery charges broken out	For accounts with one account number but multiple premises, access data for all accounts with one authentication?
Ontario Electricity Rebate	Meter multiplier/power factor (secondary or primary) /loss adjustment factor (plus whether added on the meter or not)
HST	Net metering/FIT/MicroFIT
Distributor supplier information (name, market participant ID, other, retailer – may be referenced as “agreement association” in GB standard and include retailer billing information)	
Previous consumption/billing history up to 24 months for new requests	
Other energy-related charges (e.g., specific service charges such as late payment fees)	

**Table 2: Energy Usage and Account Information: Natural Gas**

<b>Customer Energy Usage Information</b>	<b>Customer Account Information</b>
Universal Unique Identifier (GB Identifier to match data streams)	Universal Unique Identifier (GB Identifier to match data streams)
Previous read & current read	Meter number
Current reading type (e.g., actual/estimate)	Account number
Billing period – start/end dates	Customer name
Total gas usage for period (plus historical usage summary)	Premise address
Gas supply rate Gas cost adjustment Total gas supply rate (net)	Mailing address
Gas supply charge	
Delivery charges (broken out by fixed and volumetric where possible, e.g., customer charge, delivery charge, transportation charge, storage charge)	Customer contact information
Regulatory charges (broken out by item where possible)	Customer rate class
Rate riders (e.g. cost adjustment)	PEF Value
Total Charges for Natural Gas	
Total Amount Due – includes all charges	
For Equal Monthly Payment Plan (EMPP) customers: EMPP Period (Date) Total Natural Gas Charges to Date EMPP Previous Installments Current Month's installment EMPP Balance	
HST	
For direct purchase customers:	

Vendor Supply Company (direct purchase company name) Vendor Admin Fee Gas Supply Charge	
Other energy-related charge (e.g., specific service charges such as late payment fees)	

The above tables are not intended to be exhaustive lists of the data types required to be made available by any given distributor under the Green Button Regulation, which will depend on the energy data that is currently made available to customers of that distributor in the “normal course.” To the extent that a distributor’s normal practice is to make certain energy data available only to a given class of customers, that data need not be made available in Green Button format to customers in other classes.

### ***Process for Customer Authorization and Revocation of Third-Party Access***

The Green Button Regulation requires distributors to set up a process to allow customers to authorize a third party to have access to their energy data and revoke such authorizations.

Customers must be informed about the choices they are making about their data in a clear way. The importance of informed consent is even more pronounced in a context where the third parties that may be granted access to energy data are not regulated by the OEB.

OEB staff is providing the following guidance in relation to customer authorization and revocation:

- Authorization should only occur after a customer has gone through an authentication<sup>2</sup> process to verify that they are the account holder. Distributors should also consider alternate authentication approaches for customers without an online account with the distributor.
- Distributors should make the authorization form as simple as possible, and the form should only require such information as is reasonably necessary (i) to process the authorization; and (ii) for the customer to understand the choice they are making to download or share their data.

<sup>2</sup> Authentication means the process whereby an account holder’s identity is verified (e.g., for online account where an account holder enters its username and password to allow them to access their account information).

- The authorization form should include a clear statement to the effect that the customer is about to authorize the sharing of its energy usage and/or account information with a third party and that questions relating to the agreement between the customer and the third party, including how the third party will deal with their energy data, should be directed to the third party.
- The authorization form should advise the customer that the third party will continue to have access to their data until such time as the customer revokes the authorization.
- The authorization form should advise the customer that they can revoke the authorization at any time – with a link to information on how to revoke authorization.
- The authorization form and authorization process should be optimized for use on mobile devices, where it is cost-effective to do so.
- The authorization form should inform the customer of the scope-of-use, to be provided by the third party, in relation to the data to be shared with the third party. In order for the scope of use to be included a third party must provide the exact statement to be included in the Customer Authorization Form to the distributor. The distributor should copy the statement exactly as provided by the third party, and make it clear that the distributor it is not responsible for either the accuracy of the content nor the third party's actions in relation to the customer's energy data.

The Green Button Regulation requires distributors to establish a policy regarding the privacy of energy data but does not require a distributor to create a separate and distinct privacy policy for the sole purposes of Green Button. Instead, a distributor may use its existing privacy policy provided that it has been appropriately updated to reflect the implementation of Green Button. Distributors should review their existing privacy policies to ensure they are easy to read and reflect implementation of Green Button. The policy must be provided in an electronic format to a customer when they authorize a third party to have access to their energy data, and thereafter whenever the policy is updated. The authorization form should include a link to the distributor's privacy policy.

The privacy of customer data remains a priority for the OEB and, as such, is an area that OEB staff intends to monitor closely through the two-year implementation period. To facilitate the implementation of Green Button in a consistent manner across Ontario, OEB staff has prepared a template authorization form that distributors may adapt and use if they wish. A copy of the template authorization form is included as an Attachment to this Guidance.

***Termination by Distributor of Authorization of Third Party***

Under the Green Button Regulation, distributors may terminate the authorization for a given third party if there has been a significant violation of the terms and conditions under which access to the energy data was provided.

OEB staff notes 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. Rather, it is the third party's responsibility to manage the data under its own privacy policies and legal or regulatory requirements.

OEB staff also notes the need to ensure that the process for termination does not discourage the participation of third parties in Green Button through overly restrictive or unduly punitive terms and conditions between distributors and third parties.

Customer protection is a core priority for the OEB and, while the OEB may not have regulatory oversight of third parties that are authorized to receive the data, OEB staff notes that such third parties would be subject to their own obligations under the applicable privacy legislation.

OEB staff is not proposing to provide any specific guidance to distributors at this time but will continue to monitor implementation for any issues. Any questions relating to termination may be directed to the OEB's Industry Relations email or complaints email.

## Attachment –Template Authorization Form

Utility to insert logo

November xx, 2021

### Customer Authorization

We have received a request from [Third Party Name] for access to your energy usage and account information (referred to here as your “energy data”). [Third Party Name] has told us that you have agreed to give them access to your energy data.

**Energy usage** data includes your historical and ongoing meter readings and dates, billing period dates, hourly interval data and energy charges

**Account information** includes your name, service address, account number, meter number, customer rate class and your contact information

[Third Part Name] has provided the following statement regarding how they intend to use your energy usage data and account information:

[insert third party statement]

The above information was provided by [Third Party Name] regarding how they intend to use your energy data. [Distributor Name] is not responsible for the accuracy of this information or for the actions of [Third Party Name] (see “Please Read Before Giving Authorization” below)

We need your written authorization before we can start providing your energy data to [Third Party]. Once we have your authorization, your energy data will continue to be shared with [Third Party] on an ongoing basis without further notice to you unless you tell us that you want to cancel your authorization. You can cancel your authorization at any time by viewing your existing authorizations below and selecting “Cancel.”

### PLEASE READ BEFORE GIVING AUTHORIZATION

Before authorizing us to share your energy data with [Third Party], please note:

- We do not control what [Third Party] will do with your energy data once we share it with them.
- It is your responsibility to make sure that you understand and accept the terms and conditions that you have agreed to with [Third Party], including:

- How they will protect your privacy and confidentiality
- What they can do with your energy data
- Whether they can share your energy data with anyone else
- How long they will keep your energy data
- How they will destroy your energy data when they no longer need it or you ask them to

If you have any questions about what [Third Party] will do with your energy data, be sure to ask them before authorizing us to share your energy data with them.

To view [Distributor Name]'s Privacy Policy [click here](#). **This Privacy Policy does not apply to [Third Party], and it does not affect how [Third Party] will deal with your energy data.**

I authorize [Distributor Name] to share the following data with [Third Party Name]:

Energy Usage Data

Account Information Data

**Authorize**

**Cancel**

[Click here](#) to view your existing authorizations