

**Case 12-M-0476, et. al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Draft Minutes – November 6, 2015**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The Draft Minutes from the 10/23/2015 EDI Business Working Group (BWG)/Technical Working Group (TWG) meeting were adopted as final without any modifications.
- DPS Staff Remarks
  - None.

**Regulatory Update**

The BWG Chair noted that the low income collaborative report was issued today in Case 12-M-0476. It is anticipated that a notice seeking comments be issued. Presumably this will eventually lead to an Order that will lead to implementation of APP Credit-oriented EDI transactions some time in 2016.

**Review of Implementation Plans – Discussion on timing, etc**

A workpaper showing the implementation matrix update to reflect modification to the implementation of the 11/2/2015 EDI Changes for both Con Edison and Orange & Rockland.

**Utility Supported EDI Transactions**

A workpaper showing a matrix of which EDI transactions were supported by each utility was reviewed. There were no additional changes.

**ICAP Tag Discussion**

a. 814C ICAP DTM Issue and IG Examples

The Working Group reviewed proposed changes presented in a workpaper. With respect to the DTM Date/Time Reference (Effective Date of Change) segment (“DTM~007 Segment”) issue, Sergio Smilley requested that provision be optional (National Grid and Central Hudson do not send the DTM Effective Change Date with ICAP Tag changes). Charlie Trick said that NYSEG/RG&E believe that communicating the DTM~007 Segment is important and is required because it is not listed as an exception in the 814C IG (Con Edison and O&R also provide the DTM~007 Segment).

During discussion, it was noted that the Effective Change Date can be derived from the transaction creation date in the BGN segment. The TWG Chair noted that if a different date is listed in the DTM~007 then the information sent is invalid.

The issue will be resolved as follows, subject to review by Con Edison (no representative present on the call):

- The notes in the DTM~007 Segment will be modified to show ICAP Tag changes as an exception which will make provision optional.
- Utilities that currently send the DTM~007 Segment have the option to continue doing so.

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- Utilities that do not provide the DTM~007 Segment should not begin to provide it.
- Utilities should state their ICAP Tag DTM~007 practice in their Utility EDI Guides.

An updated workpaper will be reviewed at the next working group meeting.

b. 867HU Quantity (ICAP) Segment

The workpaper presented reflected the changes discussed during the last meeting – there were no additional questions so the changes will be reflected into the Draft 867 HU IG.

**Proposed addition of REF\*BLT segment to the 867MU**

A workpaper reflecting optional usage was reviewed. There were no additional questions so the changes will be reflected into the Draft 867 MU IG.

**820 Remittance Advice**

- a. The BWG Chair requests that working group participants review TOP Supplement 6 to ensure that the examples are refreshed to properly reflect current business practices.
- b. The APP Credit Frequency issue raised at the last meeting is being dropped; the EDI Standards documents provide sufficient guidance.

**997 Pricing History Modification**

A workpaper showing modifications to the AK1 Segment adding an identifier code for the pricing history transaction (503) was reviewed. There were no additional questions so the changes will be reflected into the Draft 997 IG.

**Other Business**

There was discussion reviewing the November 2nd implementation. The BWG Chair noted that among the utilities there were multiple interpretations of November 2<sup>nd</sup> date and he wanted to know if this presented any issues, particularly for EDI Service Providers. Generally, the variance in cut-over times did not present significant issues for EDI Service Providers but more specific information from utilities as to the exact time of cutover would have been helpful. Additionally, provision of test data at least two months in advance would also have been very helpful.

Several parties observed that it due to different utility systems requirement it is probably not possible to synchronize all cut-over times to an exact time but tightening the window would be an improvement. To the extent a general cutover date emerges for implementation of the APP Credit-oriented transactions in 2016, parties agreed that advanced coordination on dates/times should take place via the EDI Working Group.

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Finally, it was noted that the December 2, 2015 Testing Date for APP credit will need to be extended again. The BWG Chair will draft an extension and present it as a workpaper for the next meeting. Unless more specific guidance becomes available in an upcoming Order, another 4 month extension will be requested.

**Establish date/time for next meeting**

The next meeting will be a combined BWG/TWG meeting on Friday 11/20/2015 at 10 AM.

**Attendees**

Jeff Begley – NOCO Energy Corp.	Travis Bickford – Fluent Energy
Jess Cromie – Ethical Electric	Joe Falcon – Ambit Energy
Barbara Goubeaud – EC Infosystems	Gary Lawrence – Energy Services Group
Janet Manfredi – Central Hudson	Veronica Munoz – Accenture
Mike Novak – National Fuel Gas	Jean Pauyo – O&R
Rich Phillips – Latitude Technologies	Charles Porter – Aurea
Adam Powers – Ethical Electric	Kris Redanauer – Direct Energy
Sergio Smilley – National Grid	Robin Taylor – DPS Staff
Jasmine Thom – CES	Charlie Trick – NYSEG/RG&E
Jennifer Vigil – Champion	Kim Wall – PPL Solutions
Craig Wiess – National Grid	Amie Williams - Agway
Jason Gullo – NFR	