

**Case No. 12-M-0476 et al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Draft Minutes – July 13, 2018**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted.
- The Draft Minutes from the 6/15/2018 meeting were adopted as final without modification.
- DPS Staff Remarks: None.

**Regulatory Update**

The BWG Chair provided an update on matters in Case No. 18-M-0376 and the informal process that has been underway concerning cyber security matters. In particular, a meeting will be held July 26th and 27th in Albany to review edits to the proposed DSA. The proposed edits for discussion during this meeting will be made available on the DSA-VRA website for review next week; there will be significant modifications proposed. Additionally, ESCOs and EDI Service Providers should expect call from a utility representative soon if they have not yet provided a Self-Attestation form.

With regard to UBPs proposed in Case 98-M-1343, in response to an ESCO question concerning new budget billing requirements in the UBPs, the BWG Chair responded that he was unaware of any Commission Orders. In March 2018, in light of the additional comment period and in order to provide time for the Commission to consider the requests for rehearing, the deadline for ESCOs eligible to operate in New York and electric and gas distribution utilities that have tariffed provisions providing for retail access to comply with the Commission's Order Adopting Revised Uniform Business Practices was extended to July 26, 2018.

**Updates to EDI Implementation Plan(s)**

- a. Current EDI Standards Matrix

The BWG Chair reviewed the matrix noting changes discussed during and provided by National Fuel and O&R since the last working group meeting. No further changes were provided during the meeting.

**Other Business**

Mike Novak (National Fuel) stated that with respect to ongoing to cyber issues, they are examining all electronic touch points and looking to reducing number of touch points. They determined that if sync lists on its secure website could be provided via EDI, some ESCOs would not need to access the secure website as frequently; perhaps not at all. As a result, an EDI transaction where they ESCO can request an EDI sync list from the utility could be proposed at a future meeting.

Gary Lawrence (ESG) noted that with the new generic ESCO credit that's been added to the 814C, he thinks that it's possible that correspond modifications to the 820 should have been made. The BWG Chair recalled that he believes that matter was previously addressed (with no recommended change to the 820 because current codes were sufficient). The BWG Chair added that if upon Mr. Lawrence's review of meeting minutes and postings more codes are needed, the EDI Working Group can make the appropriate modifications.

Angela Schorr (Direct Energy) asked if the new generic ESCO credit segment could be used to provide customers with one-off goodwill credits or should AMT7 segment be used. The BWG Chair responded that the AMT7 is now specifically for Guaranteed Saving Program credits, regardless of APP Status, and that the new generic credit segment is for any other crediting, e.g. it could be used for one-off credits or for REV case related credits.

### **Establish Date/Time for Next Meeting**

The next meeting combined BWG/TWG meeting is scheduled for Friday 8/10/2018 at 10 AM.

### **Attendees**

Jean Pauyo – O&R	Debra Croce – EC Infosystems
Julie Goodchild – Direct Energy	Kris Redanauer – Direct Energy
Gary Lawrence – Energy Services Group	Thomas Dougherty – Marketwise
Eric Heaton – Con Edison	Veronica Munoz – Accenture
Jim Wade – Customized Energy Solutions	Samantha Curry – Starion Energy
Sergio Smilley – National Grid	Barbara Goubeaud - EC Infosystems
Amy Delooza – Agway Energy	Mike Day – IGS
Barbara White – Ambit Energy	Mike Novak – National Fuel Gas Dist.
Matthew Stauble - ATMS	David Parnell - Direct Energy
Pete Foster – NYSEG/RGE	Rebecca Sweeney – DPS Staff
Christina Binmore – XOOM Energy	Travis Bickford – Fluent Energy
Jeff Begley – NOCO	Angel Alvarez – Con Ed
Angela Schorr – Direct Energy	Janet Manfredi – Central Hudson