

**Case No. 12-M-0476 et al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Final Minutes – May 5, 2017**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- DPS Staff Remarks: None.
- The Draft Minutes for the 4/7/2017 meeting were adopted as final without modification.

**Regulatory Update**

There were no regulatory actions since the last meeting that impact EDI development.

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

**a. Current EDI Standards Matrix**

The BWG Chair presented the matrix which contained changes discussed at the last EDI Working Group meeting. There were no additional changes.

**b. Prohibition Order Matrix**

The BWG Chair presented the matrix which contained changes discussed at the last EDI Working Group meeting. There were no additional changes but there was discussion about the uncertainty of the May 26<sup>th</sup> implementation date for the Prohibition Order. In general, utilities felt they could not provide any more certainty and that the estimated dates should for now be considered the best working information

Kris Redanauer (Direct Energy) noted that for utilities identifying ineligible customers via sync lists, the matrix should be updated to reflect that all customers are being listed by ineligible customers will be flagged.

**Review of March 31, 2017 EDI Report Filing**

a. 867HIU/MIU Related Updates

The BWG Chair discussed the circumstances that lead to the April 10 EDI Report filing regarding the inadvertent omission of codes for Interval Usage for the LIN Item Identification segment in the 814E Implementation Guides. Since then, other errata have been found as follows:

- 814C Workpaper – missing REFIU code for interval usage and a misspelling.
- 814E Response Information/Warning Segment – added a missing letter to a REF02 code.
- 867HIU Data Dictionary – substitution of IA code for XY code (used in the working versions of DD).
- Incorrect segment ordering in 867HIU and 867MIU IGs and DDs

These corrections are helpful at this stage of ConEd/O&R's implementation because they should help to prevent more serious issues closer to the implementation date. Con Ed and O&R expect the first interval meters to be installed during July 2017.

The BWG Chair explained how the corrections addressing the errata would be posted on the EDI Working Group web page, made available by ConEd and O&R and incorporated into the draft EDI Standards documents to be filed as a part of the August 31, 2017 EDI Report.

### **Phase I Testing Discussion**

The BWG Chair reviewed a workpaper showing clarifying updates to the TOP Supplement regarding the role of utilities and Established EDI Service Providers when new (to New York) ESCOs apply to be qualified to serve customers in New York. Based upon discussion, the modifications were acceptable and will be included in the August 31, 2017 EDI Report.

### **814D Business Process – Customer Moves/Account Closure**

A workpaper proposing changes to the 814D Business Process document were discussed. In general, the EDI transactions associated with customer moves expect precision; customer moves (and their accounts being closed) on the dates they had provided to the utilities in advance of their moves. In reality, many customers do not move on the projected dates and there is uncertainty as to whether and what transactions should be provided by utilities to ESCOs in these circumstances in order to reflect the customer's continued service from the ESCO. In reality, the only certain date is the date that the customer actually moves and closes their account.

Dan Stier (Direct Energy) suggested that an alternative solution might be to process switches on the scheduled move dates even if that means switching customers to utility supply service. The BWG Chair suggested that would require a UBP change (and accompanying regulatory action).

More offline discussion among utilities and among ESCOs needs to take place to investigate the feasibility of the alternative solution.

### **Change Control Process**

There were no updates concerning the Change Control web page.

### **Other Business**

None.

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

The next meeting combined BWG/TWG meeting on Friday 5/12/2017 at 10 AM.

**Attendees**

Amie Delooza – Agway	Adam Powers – Clean Choice Energy
Barbara Goubeaud – EC Infosystems	Eric Heaton – Con Ed
Dan Stier – Direct Energy	Charlie Trick - NYSEG
Jason Miller – Con Ed	Deborah Croce – EC Infosystems
Gary Lawrence – Energy Services Group	Eddie Oton - Accenture
Janet Manfredi – Central Hudson	Rick Malek – National Grid
Jeff Begley – NOCO	Jean Pauyo – O&R
John Cooney – National Grid	Jasmine Thom - CES
Kris Redanauer – Direct Energy	Mary Do – Latitude
Liz Ciborowski – NYSEG/RGE	Mike Novak – National Fuel Gas Dist.
Sergio Smilley – National Grid	Marie Vajda – NYSEG/RGE
Thomas Dougherty – Marketwise	Rebecca Sweeney – DPS Staff
Tracie Gaetano – IGS	Samantha Curry – Starion Energy, Inc.
Travis Bickford – Fluent Energy	Veronica Munoz - Accenture