

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)
Final Minutes – May 9, 2014

Administration

- Review/Modify Agenda: Mike Novak added an item on efficiency of the implementation guides.
- Review of Draft Minutes: minutes from the April 25, 2014 BWG meeting were reviewed and no changes were suggested. The final minutes will be posted on the EDI Working Group web page.

Technical Working Group (TWG) Questions

1) SIC/NAISC Codes

- There are different formats for different utilities—one is a six digit code and one is a four digit code. Based upon TWG's recommendation, a segment will be added to differentiate SIC from NAISC codes.
- A question was raised by the TWG regarding what to do if a utility doesn't have a code. It was determined that if the utility doesn't have a code then nothing would be sent.
- This will be renamed, "Industry Classification Code."

2) Tax Exemption Indicator

- Draft verbiage for the Implementation Guide was presented. BWG attendees were instructed to have this language reviewed by each company's attorneys.
- Suggested revisions to the draft language will be discussed at the next BWG call.
- The TWG will drop this language in as a placeholder.

3) Enrollment Block Indicator

- This will be renamed, "Block on Account"
- The 867 HU transaction will be conditional, i.e. provided if it is available in the utility's system, with the codes BB - Enrollment Block and Historical Usage Block, EB - Enrollment Block, HB - Historical Usage Block and NB - No Block.
- It was agreed that an 814 HU, which is also available pre-enrollment, could optionally be used with a block indicated by the code CAB, e.g. Con Edison uses the 814 HU response.
- Due to difference in how each utility employs customer blocks, it was agreed that utilities should explain their implementation in supplemental utility specific guides/instructions.

4) Account Settlement Indicator

- Con Edison is still investigating how it will implement requirements from the Commission Order.
- The name of the code "C" should be changed to "Class Load Shape."
- National Grid is investigating availability of settlement information from their billing system.

5) Metered vs. Unmetered

- The BWG confirmed TWG's proposal to send a REF*MG*UNMETERED when there are unmetered services on the account.

6) NYPA/Recharge NY Indicator

- The BWG confirmed TWG's proposal to use "YP" as a Reference Identification Qualifier.

7) Utility Discount Indicator

- Draft verbiage for the Implementation Guide was presented. BWG attendees were instructed to have this language reviewed by each company's attorneys.
- Suggested revisions to the draft language will be discussed at the next BWG call.
- The TWG will drop this language in as a placeholder.

Discussion

1) Low Income Enrollment Status (continued)

- There will be a meeting on 5/13/14 in Albany with staff to discuss low income issues. BWG will determine what it can do next on this topic after this meeting.

2) Reject Reason Codes

- The Commission Order discusses creation of a customer block code that already exists. DPS Staff will be contacted to request clarification on this issue.

3) Utility Maintained Implementation Guides/Documents

- The Chair raised an issue as to whether references to utility-specific implementations should be stripped out of the general EDI Standards and placed in individual utility-specific implementation guides/materials.
- The intent is to prevent the core EDI Standards from becoming outdated as utility implementations change.
- The individual utility-specific implementation guides/materials would contain comments, notes, etc. particular to each utility's implementation and would be "living documents"; utilities would be required to keep them up to date.
- Further discussion will take place at the next BWG meeting.

Next Meeting

The next meeting will be on 5/16/14 at 10 am and could be a combined BWG/TWG meeting where the first half of the meeting would be for the BWG and the second half would be for the TWG. Items to be discussed:

- Language on the two verbiage suggestions
- Low Income related EDI transactions
- Reject Reason Codes
- Utility Maintained Implementation Guides/Documents

Attendees:

Patrice O'Connor—Dept of Public Service Staff	Diane Beard—National Grid
Jeff Begley—Fluent Energy	Rock Carbone—Agway Energy Services
Brian Calhoun—Energy Services Group	Mary Do—Latitude Technologies
Tom Dougherty--ISTA	Christine Hughey--Constellation
Giovanni Formato—Con Edison	Jackie Hernandez—Con Edison
Donna Satcher-Jackson—National Grid	Gary Lawrence—Energy Services Group
Jennifer Lorenzini—Central Hudson	Janet Manfredi—Central Hudson
Mike Novak—National Fuel Gas Distribution	Jean Pauyo—O&R
Veronica Munoz--Accenture	Pat Reno—TransCanada Power Marketing
Rich Riley—National Grid	Angela Schorr—Direct Energy
Sergio Smilley—National Grid	Jim Stauble--Accenture
Jay Sauta—Agway Energy Services	Kurt Spaeth—Integryst Energy
Rich Spilky—Integryst Energy	Rick Tra—National Grid
Kandi Terry—Just Energy	Carol Teixeira—National Grid
Debbie Vincent—UGI Energy Services	Marie Vajda—NYSEG/RG&E
Kim Wall—PPL Solutions	Kimberly McNary--Ambit
Joe Falcon--Ambit	Debbie Rabago--Ambit
Kelvin Garner—GDF Suez Energy Resources	Michael Landivar—GDF Suez Energy Resources
Maurice Winter—GDF Suez Energy Resources	Marc Webster —NYSEG/RG&E