

**Case 12-M-0476, et. al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Draft Minutes – September 12, 2014**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted with a correction for next meeting date.
- The 9/5/2014 Draft Minutes were adopted as Final with a modification to the attendance list.
- DPS – no remarks.

**EDI Modification Priority Planning**

The spreadsheet was updated this week to reflect the status of modifications to the Implementation Guides, Data Dictionaries and Business Process documents.

**Update on EDI Outreach Communication to REMS forum**

The BWG Chair discussed the three responses that had been received and noted that none of the requests objected to the EDI Working Groups’ approach for items to be included in the October EDI Report filing. All three responses expressed opinions about the provision of Utility Full Service Bill Amounts.

No action to be taken right now. When the Stay gets lifted and if this becomes a relevant topic, the responses will be considered during the discussion.

**Technical Working Group Discussion**

The BWG notes that workpapers has been posted showing modifications to the 810 Single Retailer Implementation Guide, Data Dictionary (“DD”) and Business Process document. The substance of the changes had been presented months ago but was now being represented to reflect conventions that have been used in the modifications to 814E, 814C, 814HU and 867HU documents. The changes are necessary when National Fuel implements its new billing system in 2015.

Mary Do and Gary Lawrence, lead the technical review of modifications to Implementation Guides & Data Dictionaries, respectively. It was noted that an effort will be made to ensure that segment names are used consistently through each if the IGs and DDs.

- 814E Enrollment Request and Response IG
  - The NYPA/ReCharge NY Indicator segment will be renamed “NYPA Discount Indicator” and various changes will be made to indicate that ReCharge NY is one type of NYPA discount that could be indicated.
    - Most utilities will provide the indicator through their web sites.
  - Language in the note for Utility Discount Indicator segment within the 867HU IG will be added into the corresponding 814E note.

- Within the ICAP Tag segment, the note pertaining to AMT01 will be updated to replace Transmission Obligation with ICAP.
- 814E Enrollment Request and Response DD
  - Changes will be made to conform to changes in the IG.
- 814C Change (Account Maintenance) IG
  - Changes will be made to conform to changes in the 814E IG, as necessary.
- 814C Change (Account Maintenance) DD
  - Changes will be made to conform to changes in the IG.
- 814HU Consumption History Request & Response IG
  - Changes will be made to conform to changes in the 814E IG, as necessary.
  - The description for HUR will be revised to “Historical Usage not Released”.
- 814HU Consumption History Request & Response DD
  - Changes will be made to conform to changes in the IG.
- 867HU Consumption History Request & Response IG
  - Changes will be made to conform to changes in the 814E IG, as necessary.
  - Since Grid will no longer be proving gas profiles, segments and other references to items particular to their implementation will be removed from the IG.
  - A note explaining the Code AJ-Adjusted Kilowatt Demand will be added.
- 867HU Consumption History Request & Response DD
  - AMT Monetary Amount (ICAP)-AMT03 changes will be made, including a segment name change.

The BWG chair noted that an email message will be sent out letting recipients know when the working group considers these finalized and ready for the October 2014 Report.

## **EDI Glossary**

The BWG Chair reviewed modifications to EDI Glossary; some of which has resulted from discussion during last week’s Working Group call. Other than minor formatting changes, no one had any other items that need to be changed.

## **Business Process Documents**

The BWG Chair reviewed initial modifications to the Business Process Documents for the 814HU, 814E and 814C transactions which consisted primarily of non-substantial formatting issues and replacement of the terms E/M and ESCO/Marketer with ESCO. Utility personnel were asked to look through the documents to see if there is anything specific to their company that should be revised. It was noted that language describing the PTD\*FG Loop may need to be added to the 814 HU document.

## **Test Plans**

Modifications to Test Plans have not been started yet.

## **Internet Electronic Transport mechanism**

While prior discussion had focused on whether or not to change the NY standard from GISB 1.4 to GISB 1.6, discussion revealed that in some cases, both GISB 1.5 and GISB 1.6 are already being used by some utilities and ESCOs in New York. Utilities are still studying the costs of moving to GISB 1.6, it does not appear necessary that all of New York switch to 1.6 at the same time. Another possible path going forward could be to embrace some form of optionality in the October 2014 EDI Report.

## **NYPSC EDI Web Page Review**

The BWG Chair reviewed a workpaper showing the content of several NYPSC EDI web pages. Some of the pages, e.g. the EDI Party list were obsolete and probably could be eliminated. Working Group members were asked to test the existing web pages to review content to help determine if is still needed or needs to be updated. Additionally, links should be clicked to see if they are active or functioning properly.

## **Priority I A Discussion**

There were no updates since last week's meeting.

## **Priority II Discussion**

There were no updates since last week's meeting.

## **Priority III Discussion**

There were no updates since last week's meeting.

## **Establish date/time for next meeting**

The BWG Chair proposed a more deliberate pace to work to make sure that all modifications shown in workpapers to be presented at the next meeting be as near final as possible. For example, the Working group should defer data dictionary work until the changes identified in this week's meeting discussion a properly recorded in the IGs. While the Working Group will not meet next week, workpapers will be posted during the interim (as they become available) and working group member will be asked to review and forward any comments or suggested changes to the BWG/TWG chairs during this period. Email messages to let the working group know that postings have been made will be issued. Absent any comments, remaining changes to the IGs would likely be limited to those identified through use of the Foresight tool, when they become available.

The next meeting will be a combined BWG/TWG meeting on 9/26/14 at 10 A.M. The primary focus will be technical development for the Phase I items; finalizing the work products in preparation for the October 23, 2014 Report filing.

**Attendees**

MaryAnn Allen – Integrys Energy	Zeno Barnum – Hudson Energy
Jeff Begley – Fluent Energy	Mary Do – Latitude Technologies
Tom Dougherty – Aurea Energy Services	Joe Falcon – Ambit Energy
Giovanni Formato – Con Edison	Jason Gullo – National Fuel Resources
Donna Satcher-Jackson – National Grid	Gary Lawrence – Energy Services Group
Jennifer Lorenzini – Central Hudson	Janet Manfredi – Central Hudson
Veronica Munoz - Accenture	Mike Novak – National Fuel Gas
Jean Pauyo – Orange & Rockland	Debbie Rabago – Ambit Energy
Jay Sauta – Agway Energy Services	Sergio Smilley – National Grid
Robin Taylor – Dept. Public Service	Rick Tra – National Grid
Charlie Trick – NYSEG/RG&E	Marc Webster – NYSEG/RG&E
Kim Wall – PPL Solutions	