

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – June 19, 2015

Administration

- Review/Modify Agenda: The Draft Agenda was adopted without modification. The Chair noted that Utility Test Plan discussion would take place under the Phase III Testing item.
- The Draft Minutes from the 6/12/2015 EDI Business Working Group (BWG)/Technical Working Group (TWG) meeting were adopted without modifications.
- DPS Staff Remarks – None.

July 20 Report Deliverables

- a. Phase I Testing
 - No update - The BWG Chair reminded everyone that the proposal discussed during prior meetings that would shift Phase I testing from DPS Staff to utilities and EDI Service Providers will be formally proposed in the July 20 EDI Report.
- b. Phase III Testing
 - The BWG Chair noted emails during the week concerning whether all testing of changes from the March 2 Order (“March 2 Changes”) would be expedited. Observing that the March 2 Changes were effectively updates to Phase III Testing, the guidance provided in the last set of changes to the TOPs gave the utilities discretion, based upon consultation with EDI Services Providers and ESCOs active in their programs, to determine the depth of testing necessary. Because circumstances vary, it is possible that any range of outcomes between expedited and traditional full testing for every ESCO could result. Again stressing the importance of consultations among the EDI testing parties, the overall objective is to ensure “appropriate” testing for the circumstances at hand.
 - Janet Manfredi (Central Hudson) reviewed a workpaper showing a generalized test plan for the March 2 Changes. Parties were asked to review the plan and if they have any questions or suggestions, to raise them at the next working group call. Such comments will help to inform the development of each utility’s test plans. Central Hudson announced they were ready to begin testing of the March 2 Changes and several EDI Service Providers noted they would participate.

c. APP Credits – 814C Business Process Document Change

The BWG Chair reviewed a workpaper identifying APP Credit related changes to the 814C Business Process (BP) document that were filed with the April 7 EDI Report. He felt that filed changes were adequate but encouraged parties to review the document and forward any suggested changes for discussion at the next meeting.

d. Reducing Time between EDI Standards Filing and Implementation

The BWG Chair noted that the workpaper from last week’s meeting is under review but he hasn’t received any substantive comments yet. ESCOs were reminded to have their legal staff

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review the document; there is still time to make changes before the July 20 Report. Revisions should be sent to the BWG Chair so that updated workpapers can be prepared for the next EDI Working Group Meeting. When the document is finalized, it will be an attachment to the July 20 EDI Report.

e. Reducing APP Credit Rejection Incidences – 820 Transaction Modifications

Marie Vajda (NYSEG) reviewed a workpaper showing suggested changes the verbiage in the gray boxes in the 820 Implementation Guide (IG) for data elements RMR04, RMR05, RMR06 and RMR08. There were now comments so the changes will be reflected in the July 20 Report Preparation documents for the 820.

Jay Zhang asked when the APP Credit oriented changes will be implemented. The BWG replied that the timing was uncertain because related collaborative meetings and the regulatory process had not yet reached a conclusion. Further discussion concerned the direction of the transactions (Utility to ESCO & ESCO to Utility) as well as the circumstances under which an ESCO would still need to directly send credits to customers. Mr. Zhang also asked if an example for submitting an APP Credit via an 814C was available; the BWG Chair wasn't sure but will check.

The Chair noted that since the APP Credit changes could be used by Rate Ready utilities on an optional basis to process other non-APP credits, a note will be added somewhere in the 820 EDI Standards documents to reflect such optionality.

f. Provision of Full Service Billing Amounts – 503 & 824 EDI Transaction Modifications

The BWG Chair noted there were two workpapers; one for the 503 Business Process document and the other showing changes to the 824 IG to reflect an ESCO's ability to reject a 503 Response. The latter workpaper resulted from Jeff Begley's (NOCO) review of the 503 BP document prepared for last week's working group meeting. A corresponding example was added to the 503 BP document under review for this week's meeting.

The BWG Chair noted that rather than restate the UBPs that are shown as process rules, the current draft 503 BP document shows a list of the UBPs. This shortens the BP document and negates the maintenance issue associated with UBP changes. There were no objections to the change in the convention so the BWG Chair said that the convention would be carried over to BP documents for other transactions.

There was additional discussion concerning the business process when ESCOs missed billing windows for credits/charges under the bill ready model and the ESCO was no longer serving the customer. Grid and NYSEG/RG&E explained that based upon the circumstances that lead to the missed bill window, the ESCO could issue a dual bill for the missed period or in some cases, the cancel-rebill process might be used.

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g. Customer Email Addresses in 814C and 814E Transactions

A workpaper showing draft modifications to the 814E PER Segment to permit ESCOs to provide customer email addresses to the utility, when available, as proposed by Eric Heaton (Consolidated Edison) during last week's conference call was reviewed. The workpaper also contained an analogous segment from the PANJMD EDI Standards showing codes for email addresses and facsimile machine numbers. The BWG Chair noted that whatever changes were ultimately agreed upon for the 814E PER segment would be carried over to the 814C IG.

Mary Do (Latitude) observed that the words "Note Applicable" in the gray box needed to be changed to conditional. There was discussion on the use of the segment in other markets. Given that the proposed usage in New York of items beyond the provision of the customer's telephone number is optional, the working group decided that the NY EDI Standards should essentially mirror what PANJMD provided for the PER segment. This would also allow for utilities to optionally provide facsimile numbers and email addresses to ESCOs. Even though this was beyond what was originally requested, ConEd agreed that it made sense to modify the 814C and 814E PER segments in this manner. An updated workpaper will be prepared for next week's conference call.

Establish date/time for next meeting

The next meeting will be a combined BWG/TWG meeting on Friday 6/26/2015 at 10 AM.

Attendees

Alecia Stehnick - Crius Energy	Jennifer Lorenzini – Central Hudson
Barbara Goubeaud – EC Infosystems	Jennifer Vigil – Champion Energy Services
Charlie Trick – NYSEG/RG&E	Jenny Dieter – Ambit Energy
Craig Wiess – National Grid	Joanne Seibel – Orange & Rockland
Debbie Rabago – Ambit Energy	Joe Falcon – Ambit Energy
Eric Heaton – Con Edison	Julie Goodchild – Direct Energy
Gary Lawrence – Energy Services Group	Kris Rednauer – Direct Energy
Janet Manfredi – Central Hudson	Marie Vajda – NYSEG/RG&E
Jason Gullo – National Fuel Resources	Mary Agresti – National Grid
Jay Sauta - Agway	Mary Do – Latitude Technologies
Jay Tompkins – Central Hudson	Mike Novak – National Fuel Gas
Jay Zhang – Just Energy	Sergio Smiley – National Grid
Jeff Begley – NOCO Energy Group	Thomas Dougherty – Aurea Energy Services