

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – January 8, 2016

Administration

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The Draft Minutes from the 12/4/2015 EDI Business Working Group (BWG)/Technical Working Group (TWG) meeting were adopted as final modified to incorporate a few non-substantive modifications.
- DPS Staff Remarks
 - None

Regulatory Update

- Other than the EDI Order that was issued on 12/7/2015 (“December 7 EDI Order”), nothing much has happened since the last meeting. Some matters that will have an EDI impact are still out for comment, e.g. Low Income/APP Credit.
- The Accelerated Switching Order was issued on December 23 and drove some changes to a few EDI Standards documents – primarily business process documents and implementation guides.
 - Staff noted the UBP was updated and is on the DPS website.

EDI Order

The BWG Chair gave a high level overview of the December 7 EDI Order

- With the Phase I process being handed over to the utilities, updates to some of the TOP documents and the EDI web site to reflect that Phase I testing will no longer be handled by DPS Staff have been made.
- Barbara Goubeaud (EC Infosystems) asked about testing and implementation of optional items from the Order and how much notice utilities will provide if they chose to implement these items.
 - The BWG Chair responded that he believes the July 24, 2015 EDI Report proposed a minimum of 30 days’ notice for new items however minor changes/error corrections could occur on very short notice. He also suggested the EDI Standards documents can be updated to memorialize the timelines from the report if necessary.
 - Ms. Goubeaud suggested that continuous updating the EDI Working Group’s Market Change EDI Implementation Workpaper would be helpful.
- Craig Wiess (National Grid) asked about the timeline for implementing APP Credit oriented transactions. The BWG Chair hypothesized that once an Order was issued, that would “start the clock” on the APP Credit calculation, the Working Group would meet and set a timeline that would allow for systems development, EDI testing and set an EDI implementation date.

Review of Implementation Plans – Discussion on timing, etc

- Utility Supported Transactions matrix - NFG will no longer support the 568 EDI Transaction and instead will accept emails to accomplish the business process for which the 568 was intended.
 - No utilities are now accepting that transaction so based upon discussion at prior Working Group meetings consideration (at upcoming meetings) will be given to either “Mothballing” or retiring the 568.
- Updates to Implementation Matrix – nothing was prepared for this meeting but utilities will meet offline to prepare a workpaper in response to the December 7 EDI Order to be discussed at the next Working Group meeting.

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Phase I Testing

The BWG Chair discussed proposed changes to various EDI Standards documents to implement the Phase I testing changes as follows:

- Changes to TOP Supplements – The language describing Phase I testing process was updated. The biggest change was to TOP Supplement 1, Appendix B to include the Phase I testing rules.
- Phase I Testing Application – There were no substantive changes to application but basic instructions for applicant ESCOs and EDI Service Providers were added in response to last meeting.
 - EDI Service Providers were asked to review the application to help ensure that the instructions for applicant ESCOs (who were EDISP clients) were adequate.
- Changes to Electronic Data Interchange (EDI) - Testing & Certification web page has been updated and otherwise streamlined.
 - The Established EDI Service Providers posting should be checked for accuracy – if and errors/omissions are found they'll be reviewed and corrected, as necessary.

EDI Report Preparation Web Page

The BWG Chair gave a high-level review of the documents posted to the January 29, 2016 Report Preparation pages noting the additions since the last meeting; primarily data dictionaries and data dictionaries. The timing of the next report is intended to ensure modified EDI Standards would be in effect before the gas switching timeline changes became effective or if the filing date needs to be postponed, in time for the ICAP Tag modifications this spring.

All parties were asked to review the pages listed in the posted Change Index and report items that need to be modified. Changes could be submitted by email – marked-up scans of pages would be acceptable or if anyone wanted a copy of the word version of the draft documents to put changes into the documents, they should contact the BWG Chair.

Other Business

Craig Wiess noted that based upon their initial investigation, further EDI Standards development might be needed to address the procedures or EDI Transactions to be used when an ESCO makes a mistake on an inbound APP credit. Currently there does not appear to be anything in place for errors, particularly for ESCO customers who have been dropped by the ESCO issuing the APP Credit who are now being served by another supplier.

- Future working group discussions look into this issue.
- Gary Lawrence (ESG) suggested that allowing a “sign”, i.e. allowing for positive and negative APP Credits, might be helpful.

Establish date/time for next meeting

The next meeting will be a combined BWG/TWG meeting on Friday 1/22/2016 at 10 AM.

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Attendees

Mary Agresti – National Grid	Travis Bickford – Fluent Energy
Debra Crochie – EC Infosystems	Colin Tyler – NRG
David Parnell – Direct Energy	Chrissy DeLoughrey – Energy Services Group
Mary Do – Latitude Technologies	Thomas Dougherty – Marketwise
Britney Taylor - GDF Suez	Barbara Goubeaud – EC Infosystems
Jason Gullo – National Fuel Resources	Eric Heaton – Con Edison
Gary Lawrence – Energy Services Group	Jennifer Lorenzini – Central Hudson
Janet Manfredi – Central Hudson	Veronica Munoz – Accenture
Ewen Ng – EARTH Corporation	Mike Novak – National Fuel Gas
Jean Pauyo – O&R	Adam Powers - Ethical Electric
Donna Satcher-Jackson – National Grid	Sergio Smilley – National Grid
Jasmine Thom – CES	Charlie Trick – NYSEG/RG&E
Marie Vajda – NYSEG/RG&E	Jennifer Vigil – Champion
Debbie Vincent – UGI Energy	Craig Wiess – National Grid
Amie Williams – Agway Energy	Jeff Begley - NOCO