

**Case No. 12-M-0476 et al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Draft Minutes – March 2, 2018**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted.
- The Draft Minutes from the 2/16/2018 meetings were adopted as final without modification.
- DPS Staff Remarks: None.

**Regulatory Update**

No regulatory action directly impacting EDI since the last working group meeting has occurred.

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

- a. Current EDI Standards Matrix

The BWG Chair reviewed changes since the last meeting. No other utility updates were provided.

**March 30, 2018 Report Preparation Update**

The latest draft versions of all the EDI Standards documents are on posted on the EDI Report Preparation web page. There were no updates since the last meeting but updates will be prepared for the next meeting. The BWG Chair reminded working group participants to review draft documents posted on the Report Preparation web page. While preparations for the March 30, 2018 EDI Report date are still on schedule, the report could slip to April 30, 2018 if modifications currently under discussion become delayed.

**DERS related EDI changes**

Updated data dictionaries have been posted on the EDI Report Preparation web page.

**NFG ECB Prohibition Order Requirements**

Updated data dictionaries have been posted on the EDI Report Preparation web page.

**ESCO Bill Credits to non-APP Customers**

The BWG Chair reviewed a workpaper with changes proposed based upon the discussion during the last meeting and input from the TWG Chair (highlighted throughout the document). The decision to retain the 814C AMT\*7 segment name as ESCO Pricing Adjustment Credit was affirmed.

The BWG noted language in the gray box note that stated that the EPA Credit would be reflected in 820s issued by Bill Ready Utilities only, except when a Rate Ready Utility was no longer serving the customer. This language, which was added a few EDI Report filings ago, appears to have reversed the roles of Rate Ready and Bill Ready utilities and should be corrected.

With respect to the 814C REF\*TD Segment, a new code AMTUIJ was added and the note for code AMT7 was modified to reference the GSP Credit. In the 814C REF\*7G Segment, the descriptions for code ECB and IF were modified to remove explicit references to EPA credits which made them suitable for rejecting ESCO Generic Credits as well. After further discussion, additional language referencing the cases where the ESCO does not/no longer has a billing relationship with utility were added to the ECB rejection code description.

For the 810UBR SAC segment, language referencing GSP credits was added to the CRE030 code. For the 820 RMR segment, language referencing GSP credits and ESCO generic credits were added to gray box notes. The workpaper referenced comments from the TWG Chair suggesting that modifications pertaining to ESCO Generic Credits were unnecessary because if Bill Ready utilities did not reflect details such credits in their 820s (other than in net total amounts), there was no reason for Rate Ready utilities to do so. Further, unlike GSP credits, a generic credit was not a special case warranting further detail. Craig Wiess (National Grid) was unsure of this approach because of past efforts where detail was omitted only to be added subsequently when it was determined that it was necessary after implementation. Utilities will need to examine their implementations offline to determine how to move forward.

Should the Working Group determine that detail for generic credits was necessary in the 820, based upon discussion, it was decided that a new RMR07 code 81 should be added to the SAC segment.

#### **Other Business**

None.

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

The next meeting combined BWG/TWG meeting is scheduled for Friday 3/16/2018 at 10 AM.

#### **Attendees**

|                                       |  |
|---------------------------------------|--|
| Henry Hughui – Big Data Energy        | Debra Croce – EC Infosystems                 |
| Juliana Griffiths – National Grid     | Janet Manfredi – Central Hudson              |
| Gary Lawrence – Energy Services Group | Julie Goodchild – Direct Energy              |
| Craig Weiss – National Grid           | Samantha Curry – Starion Energy              |
| Sergio Smilley – National Grid        | Amy Delooza – Agway Energy Services          |
| Kris Redanauer – Direct Energy        | Mike Day – IGS                               |
| Jean Pauyo – O&R                      | Mike Novak – National Fuel Gas Dist.         |
| Eric Heaton – Con Edison              | Thomas Dougherty – Marketwise                |
| Pete Foster – NYSEG/RGE               | Rebecca Sweeney – DPS Staff                  |
| Barbara Goubeaud – EC Infosystems     | Travis Bickford – Fluent Energy              |
| Jeff Begley – NOCO                    | Michelle Ferrara – National Fuel             |
| Emilie Cimoli – Clean Choice Energy   | David Parnell – Direct Energy                |
| Liz Ciborowski – NYSEG/RGE            | Jasmine Acosta – Customized Energy Solutions |
| Angela Schorr – Direct                | Edward Son – Ambient                         |
| Diana Neira – NYSEG/RGE               | Nicole Baier – National Fuel Gas Dist.       |
| Jim Stauble - Accenture               |  |