

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – October 14, 2014

Administration

- Review/Modify Agenda: The Draft Agenda was modified to move the discussion of the next meeting following adoption of the minutes.
- The 10/3/2014 Draft Minutes were adopted as Final with additions to the attendee list.
- DPS – no remarks.

Establish date/time for next meeting

The next meeting will be a combined BWG/TWG meeting on Monday 10/20 at 1PM; no meeting will take place on Friday 10/24.

Review of Draft Report

The BWG discussed the format of the report and noted that drafts will be posted, as they become available, to the October 23 Report web page.

Technical Working Group Discussion

The BWG Chair noted there had been offline discussion of how customer blocks would be communicated to ESCOs via the 814HU Response and 867HU transaction. A workpaper memorializing the discussion and containing proposed additions to the 814E and 814HU Business Process documents was posted for today's meetings. These changes, if not reflected in the IGs and DDs to be review during today's meeting will also be reflected in versions that will be posted in the next few days on the October 23 Report web page.

Mary Do and Gary Lawrence, lead the technical review of modifications to Implementation Guides & Data Dictionaries, respectively. Mike Novak lead the review of the Business Process documents, as applicable.

Significant decisions/Discussion points were as follows:

- 814 Change (Account Maintenance)
 - IG – Page 25 – In the REF Reference Identification (Reason for Change - Account Level) segment, DTMAB4 Change ICAP Effective Date will be removed.
 - The IG will be modified to show AB2 and AB4, respectively, referring to ICAP Tag and Future ICAP Tag.
 - Data Dictionary – Corresponding changes will be made.
 - Business Process – There were no substantive changes.

- 814 Enrollment Request and Response
 - IG - The DTM segments for ICAP Tag and Future ICAP Tag will be relocated within the IG to be sequential.
 - The IG will be modified to show AB2 and AB4, respectively, referring to ICAP Tag and Future ICAP Tag.
 - Data Dictionary - Corresponding changes will be made.
 - Business Process – Changes to reflect discussion on communication of customer blocks were discussed and will be shown in the next version to be posted.

- 814 Consumption History Request & Response
 - IG – Changes to reflect discussion on communication of customer blocks were discussed and will be shown in the next version to be posted.
 - Data Dictionary - Corresponding changes will be made.
 - Business Process – Changes to reflect discussion on communication of customer blocks were discuss and will be shown in the next version to be posted.

- 867 Consumption History Request & Response
 - IG – Changes to reflect discussion on communication of customer blocks were discussed and will be shown in the next version to be posted.
 - Data Dictionary - Corresponding changes will be made.
 - Business Process – There is no 867HU BP document.
 - The process is addressed within the 814HU BP document.

The BWG Chair noted that the changes arising out of today's meeting discussion will be reflected in the Draft Final versions posted on the October 23 report web page.

EDI Glossary

There were no new modifications to EDI Glossary; the Glossary is ready for the October 2014 EDI Report.

Test Plans

There are three documents to be updated as a part of the October 23 Report:

- Technical Operating Profile
- Technical Operating Profile - Supplement 1
- Technical Operating Profile - Supplement 2

Most of the changes to the Technical Operating Profiles were updates to reflect updated terminology from the February 25 Order. A statement reflecting EDI testing flexibility with experienced ESCOs and EDI Service providers was added to memorialize recent utility testing practices. Based upon discussion, a statement encouraging updates to utility testing documents to better correspond to their current EDI implementations will also be added.

Further modifications to test procedures will be discussed during upcoming EDI Working Group meetings. There is a general sentiment that testing procedures need to be streamlined to better reflect the maturity of current EDI implementations.

Attendees

Jean Pauyo – Orange & Rockland	Suzanne Clark – Liberty Power
Jeff Begley – Fluent Energy	Mary Do – Latitude Technologies
Tom Dougherty – Aurea Energy Services	Kim Wall – PPL Solutions
Donna Satcher Jackson – National Grid	Gary Lawrence – Energy Services Group
Jennifer Lorenzini – Central Hudson	Mike Novak – National Fuel Gas
Veronica Munoz – Accenture	Jay Sauta – Agway Energy
Cindy Tomeny – National Grid	Sergio Smilley – National Grid
Giovanni Formato – Con Edison	Janet Manfredi – Central Hudson
Rick Tra – National Grid	Charlie Trick – NYSEG/RG&E
Marie Vajda – NYSEG/RG&E	Debbie Rabago – Ambit Energy
Debbie Vincent – UGI Energy Services	Mary Agresti – National Grid
Christine Hughey - Constellation Energy	JoAnne Siebel – Orange & Rockland