

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – February 27, 2015

Administration

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The Draft Minutes from the 2/20/2015 EDI Business Working Group (BWG)/Technical Working Group (TWG) meeting were adopted as Final with modifications to attendance list.
- DPS Staff Remarks – None.

Regulatory Update Regarding EDI Matters

An Order on the October 23 report was on the Commission's consent agenda for February 26, 2015. At the time of the meeting, the Order had not yet been made public.

ESCO Low Income Bill Credits

In the 2/6/2015 Order on Rehearing, the Commission has directed the EDI Working Group to develop an ESCO bill credit transaction now, reporting revised EDI standards on April 7, 2015 ("April 7 Report"). A workpaper showing adding a new code CRE030 - Assistance Program Participant Credit ("APP Credit") in the SAC segment of the 810 Utility Bill Ready ("UBR") Implementation Guide ("IG") was reviewed and determined to be appropriate. Because UBR systems already process ESCO credits, additional systems work related to the APP Credit should be less than what would be necessary for Utility Rate Ready ("URR") systems.

While the initial plan was to make corresponding changes to the 810 URR IG along with other changes to create a rate ready inbound 810 transaction, it was determined that this approach was not necessary. The major challenge for rate ready utilities is to integrate the APP Credit into their bill calculations and bill print process. Going forward, the working plan is to present rate ready utilities with three APP Credit options:

- Use a limited subset of the features within the UBR model to accept an inbound 810 transaction containing the APP Credit from an ESCO.
- Build a web page/portal where the ESCO would provide the APP Credit to the utility on a per customer basis.
- The utility could calculate the APP Credit for the ESCO.

The BWG chair expressed concern that the upcoming collaborative (to define the energy-related value-added products and services that must be provided to Assistance Program Participants to qualify for exemption from the price guarantee) could make utility calculation of APP Credits more complicated but so long as data requirements are adequately addressed, still feasible. National Grid will prepare a workpaper for an upcoming meeting. In the mean time, modifications related to the new CRE030 code will be made to the 810 UBR EDI Standards documents. Additionally, other changes from the February 25, 2014 Order, e.g. changing E/M to ESCO, will be made to the documents.

Contest Period/Reinstatement Requests/Other Drop Transaction Matters

The initial discussion on contest period reinstatement requests indicated no further issues since the last meeting so the proposed changes will be made to the appropriate EDI standards guides.

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The subsequent discussion focused upon what happens when a customer calls the utility and asks to return to full service. Currently when utilities send resulting EDI 814 Drop transactions to the incumbent ESCOs, depending upon the utility, an A13, B38 or CHA code is provided. In some cases, no EDI drop is sent and pool reports are used instead. The current EDI standards in this regard are voluntary and somewhat ambiguous; any of these responses is permissible.

John Holtz surveyed RESA members and they prefer EDI 814 Drops with CHA codes for switches to other ESCOs and CHU codes for drops to utility full service. This facilitates accounting/competitive value for retention and customer service. The TWG Chair noted that in Pennsylvania CHA was used in 814 Drops under both scenarios. In Texas, a return to full utility service is not permitted for retail electric service.

Other changes made or under consideration are as follows:

- For utility initiated transactions, revised the description for CHA from “Customer Changed to Another Service Provider” to “Customer Changed to Another ESCO”.
- The description for CHU will be “Customer Changed to Utility Full Service”.
- For the code 020 – Customer Moved or Account Closed, the statement “Service may be physically shut off by the Utility” was proposed to be removed because it doesn’t appear necessary; the remaining note for 020 would say “Originates with the Utility”.

A question was raised concerning how a utility should respond to a contest period CHA transaction from an ESCO. It was determined that in addition to the drop response, a reinstatement transaction should be sent provided that the contest period request was successful.

The BWG chair reviewed proposed changes to the 814 D Business Process document and noted that the next version would address the discussion concerning reinstatement transactions. Additionally, the 814R EDI Standards documents will be reviewed and correspondingly changed, as necessary.

Enhanced ESCO Service Portability

The Service Portability Workpaper was reviewed; the substance of changes needed to the 814E Implementation Guide changes appear complete and the next step will be to review if changes to the 814E Business Process document will be needed. The intention of the working group is to submit these changes along with the low income bill changes in the April EDI Report.

Use of 814E/814C to communicate sales tax rate information applicable to ESCO charges

No further issues have been raised since the last meeting so the proposed changes will be made to the 814E and 814 C EDI standards guides.

Modifications to PSC EDI Web pages

The BWG Chair reviewed the changes made to date under the AskPSC.com website; much of the functionality discussed during prior meetings has been implemented but the web pages themselves are still being updated. The Utility Guides link is not active yet but utilities were encouraged to provide links to their guides (if they exist) or to individual Utility web pages in the interim. It was also noted that a

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web page for the April 7 Report had been created to hold the work-in-progress versions of the EDI Standards documents for the upcoming report.

Modifications to Testing Procedures

There is still a need for a volunteer to lead the Testing Sub Group. It was noted that the 2/26 Order should enable expedited testing.

Other Business

Concern was again expressed about ensuring that all parties, especially small ESCOs and/or those with in-house EDI functionality, would be ready to implement when required. Staff was asked to find out DPS could send out an email and/or some form of official notice within the next month to ESCOs to remind them of the changes and of compliance obligations.

Revisiting the low income issued addressed earlier, questions regarding “energy related value-added services” items were raised. The BWG chair suggested parties speak with representative from their own companies involved in the REV case. It was also noted that a collaborative meeting on this topic has been scheduled in mid-March.

Establish date/time for next meeting

The next meeting will be a combined BWG/TWG meeting on Friday 3/6/2015 at 10 AM.

Attendees

Zeno Barnum – Hudson Energy	Jeff Begley – NOCO Energy Corp.
Julie Goodchild - Direct Energy	Mary Do – Latitude Technologies
Melinda Covey - Direct Energy	Kris Redanauer - Direct Energy
Thomas Dougherty – Aurea Energy Services	Barbara Goubeaud – EC Infosystems
Jason Gullo – NFR	John Holtz – NRG
Gary Lawrence – Energy Services Group	Jennifer Lorenzini – Central Hudson
Janet Manfredi – Central Hudson	Rebecca Myers – UGI Energy Services
Mike Novak – NFG	Jean Pauyo – O&R
Debbie Rabago – Ambit Energy	Donna Satcher-Jackson – National Grid
Jay Sauta – Agway Energy Services	Sergio Smilley – National Grid
Susan Swiderski – NRG	Robin Taylor – DPS
Jay Tompkins – Central Hudson	Rick Tra – National Grid
Marie Vajda – NYSEG/RG&E	Kim Wall – PPL Solutions
Craig Wiess - National Grid	Eric Heaton – Con Edison
Charlie Trick – NYSEG/RG&E	Debbie Vincent - UGI Energy Services