

Case No. 12-M-0476 et al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – November 18, 2016

Administration

- Review/Modify Agenda: The Draft Agenda was adopted without modification. The BWG Chair noted the 867 IU/HIU Update will be moved to the 5th item on the agenda in order to accommodate a scheduling conflict.
- The Draft Minutes for the 11/4/2016 meeting were adopted as final without modification.
- DPS Staff Remarks: None.

Regulatory Update

None.

Review of Implementation Plans for Current EDI Standards

A matrix containing updates from O&R was reviewed. During discussion, ConEd revised the status of its support for 814E: Support PER Administrative Communications Contact (Customer Phone Number) Segment to N1*BT loop via EDI to TBD.

867 IU/HIU Update

The BWG Chair mentioned that initial draft 867 IU and 867 HIU IG documents, patterned after the 867 MU and 867 HU IG documents have been posted on the EDI Report Preparation web page. ConEd will be modifying the documents inserting items from the corresponding Pennsylvania EDI documents. The modifications will be shown as redlines. The BWG Chair asked for additional volunteers to serve on the 867 IU/HUI small work group and mentioned that someone will be needed to write business process documents. Gary Lawrence will develop the data dictionaries.

Eric Heaton (Con Ed) said the goal is to implement the 867 IU and 867 HIU transactions by July 2017 and hopes to have the IGs done by the beginning of January 2017. The EDI Working group's plan is to file the 867 IU and 867 HIU transactions with the Commission on March 31, 2017 using the expedited approval process. There will also be some 814 transaction changes related to the 867 IU and 867 HIU transactions.

Seasonal Account Procedures

An updated workpaper containing changes from ConEd and O&R was reviewed. Kris Redanauer (Direct Energy) will speak with the Direct Energy personnel that initiated the request concerning seasonal account procedures to investigate whether any EDI development should be proposed.

867 HU – REF~BF Proposal

A workpaper describing current utility support of the REF~BF and REF~65 segments in the 814E Enrollment Response was reviewed. With one exception, all utilities said the REF~BF and REF~65 values were always identical. Marie Vajda (NYSEG/RG&E) explained the billing circumstances under which the values were non-identical. The BWG Chair noted that retiring REF~65 from the 814E did not appear feasible although sending the REF~65 could be made conditional.

With respect to the 867 HU, Dan Stier (Direct Energy) confirmed that it was only necessary to add REF~BF. He had no objections to concept of utilities no longer sending REF~65 in the 814E where the value was identical to that for the REF~BF. A workpaper showing proposed changes to the 814E and 867HU will be prepared for the next meeting.

Communication to pending ESCO when enrollment is cancelled

A workpaper containing the responses to four questions from each of the utilities was reviewed. Some of the utility responses were provided in advance and others were provided during the discussion. Some of the utilities need to investigate further.

As a general matter, when the customer becomes directly involved in the enrollment process the EDI processing rules break down. For example, a utility EDI response that is automatically generated in response to an ESCO EDI request is not generated because the request came in from the customer through the utility's call center. In some cases, utilities have processes to generate EDI responses/requests in response to the non-EDI/manual request from the customer.

Tom Dougherty (Marketwise) asked a question concerning the lead time for a utility to cancel a pending enrollment (in response to a customer request) prior to the scheduled switch date. The BWG Chair said that he would investigate.

Other discussion confirms that at CHA cannot be sent in response to a CHA; i.e. the pending ESCO cannot cancel or contest the incumbent ESCO's 814D-CHA contest.

An updated workpaper will be prepared for review at the next meeting.

Proposed Change Control Process

A workpaper containing updates from Kris Redanauer (Direct Energy) was reviewed. The BWG Chair said that a new web page to track submitted change requests could potentially become active in 2017. Laura Getz will check with DPS Staff regarding the creation of a fillable PDF for the Change Control Process.

EDI Test Plan Documents

- All of the draft TOPs and Supplements (1, 4 and 8) have been posted on the EDI Report Preparation web page. These documents include changes addressing Phase I/II Testing of Utilities and removing the 568 EDI Transaction
 - These documents should be part of the next EDI report to be filed.
- Qualification of new EDISPs – no updates. Since no work is likely to be completed before the next filing, this topic will be deferred to a future filing.

Other Business

- None.

Establish Date/Time for Next Meeting

The next meeting will be a combined BWG/TWG meeting on Friday 12/2/2016 at 10 AM. A special one topic conference call regarding 867 HIU/IU EDI Standards development may be scheduled during late December, otherwise the next meeting will be scheduled during the 1st week of 2017.

Attendees

Amie Williams – Agway	Jasmine Thom - CES
Angela Schorr – Direct Energy	Jean Pauyo – O&R
Anton Petrosyuk – Kiwi Energy	Jennifer Lorenzini – Central Hudson
Barbara Goubeaud – EC Infosystems	Jennifer Vigil – Champion Energy
Barbara White – Ambit	John Payton - IGS
Charlie Trick – NYSEG/RG&E	Kris Redanauer – Direct Energy
Craig Weiss – National Grid	Laura Getz – DPS Staff
Dan Stier – Direct Energy	Marie Vajda – NYSEG/RG&E
Deborah Croce – EC Infosystems	Mary Agresti – National Grid
Donna Satcher-Jackson – National Grid	Mary Do – Latitude
Elois Anderson – National Grid	Mike Novak – National Fuel Gas Dist.
Elorita Martinez – National Grid	Mike Ye – PSEG - LI
Emily Cimoli – Ethical Electric	Sergio Smilley – National Grid
Eric Heaton – Con Ed	Tom Dougherty – Marketwise
Gary Lawrence – Energy Services Group	Veronica Munoz - Accenture
Janet Manfredi – Central Hudson	