

**Case No. 12-M-0476 et al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Final Minutes – December 8, 2017**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted.
- The Draft Minutes from the 10/20/2017 meetings were adopted as final without modification.
- DPS Staff Remarks: None.

**Regulatory Update**

The BWG Chair noted the Procedural Order issued on 11/22/2017 regarding the Prohibition Order and the 10/31/2017 EDI Report had passed the 30 day comment deadline (none were submitted) so the new EDI Standards documents are now in effect.

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

a. Current EDI Standards Matrix

The BWG Chair noted that items reflecting the UBP-DERS Order and the 10/31/2017 EDI Report were being added to the bottom of the matrix. There were no updates beyond what was presented in the matrix workpaper.

b. Prohibition Order Matrix

With the TRO lifted, updated timelines reflecting for provision of ineligible customer lists and mailings to customers were reflecting in the matrix workpaper. There were no questions.

**Utility Notifications to ESCOs - Provision of ESCO Notices to EDISPs**

The utilities explained the means by which they communicated EDI Notifications to EDISPs. Among the utilities, there were varying processes. The TWG Chair noted that EDISPs implement for ESCOs in most cases and therefore need the same information ESCOs received. ConEd's ESCO Newsletters as a good source of information to EDISPs. Eric Heaton (Con Ed) says they provided at least 2 newsletters per month and post newsletters to their web site.

National Fuel communicates with ESCOs via an automated system and presumes that ESCOs forward information to their EDISPs. NFG acknowledges this approach is not working as well as it should and has been forwarding select emails to EDISPs on an ad hoc basis. NFG also posts notices to an EDI web page.

O&R has email lists for both ESCO and EDISPs. Pete Foster (NYSEG/RG&E) said they send emails to ESCOs and will look into creating an email list for EDISPs.

The BWG Chair suggested that EDISPs contact utilities directly to make sure their email contracts are correctly recorded and otherwise work out issues with those utilities.

## **Order Establishing Oversight Framework and UBPs for Distributed Energy Resource Suppliers**

### **a. DPS Staff Overview**

Ted Kelly (DPS Staff) joined the call to provide explanation of order and UBP DERS. Kelly noted the DERS-UBP Order in Case No. 15-M-0180 which include the new UBP-DERS (now incorporated into all utility tariffs). The term, DER Supplier or Distributed Energy Resource Supplier is a broad term, including companies providing solar (rooftop or farms), energy efficiency providers, storage, anybody installing something on customer's property or selling a service that relates to their consumption of electric and gas. Parties that provide remote net metering or community DG also DER Suppliers.

Kelly highlighted:

- Utility will credit for net metering and are updating process to include all DER providers.
- With customer consent, DERS should be able to obtain EDI data.

Not all DERS will be registered. Solar providers and Community Distributed Generation (CDG) providers will be required to register but Demand Response providers not required to register. Registrations, where required, due February 1.

Requirements for DERS EDI Participation are very close to the requirements for ESCOs. DERS will need to become authorized as EDI provider or hire an EDISP. Kelly reiterated that DERS must receive customer consent to access data. While the Order says that protections specifically relate to data acquired through EDI, Kelly noted that utilities have requested to extend the UBP requirements applicable to DERS to cover existing non-EDI data platforms, e.g. secured web sites, to can be used by DERS to access customer information. Kelly also noted that for now, DERS will not be enrolling customers but as things evolve, particularly as related to consolidated billing, that could change.

Kelly noted that some ESCOs will be DER suppliers; to do so they must register as DERS as well.

The BWG Chair asked if there was going to be an official list of DER Suppliers maintained by Staff. He noted that one would result for those who use EDI because they'll have to go through Phase I testing and thereby would be added to the ESCO Phase I approved list (this presumes there will be a DERS only designation).

The BWG Chair asked how, without a DPS provided list, the utility could determine that a non-registered DER Supplier was actually who they claim to be and therefore have a legitimate business interest in the customer data. Kelly replied that there is no current plan to maintain a list since some types of providers are not required to interact with Staff but the EDI list would work, at least for those who plan to use EDI. Kelly suggested that utilities could use ESCO application required in their tariff as a template for a DERS application (with regard to accessing customer data).

Thomas Dougherty (Marketwise) noted that in PA, demand response providers were required to register with PUC (which was not an extensive process) and also had to register with PJM. Dougherty noted that timely access to interval usage information is critical to proving the customer adhered to the demand response plan.

Pete Foster asked Kelly if Staff had any recommendations regarding the process to allow DERS to obtain username and password to access historical data. Kelly suggested that it was ultimately up to

the utilities to determine their own process of registration but having a common process among the utilities would probably be desirable.

**b. DERS related EDI changes**

The BWG Chair reviewed draft modifications to the TOPs and Supplements. These modifications, reflected as redline markup changes in the postings, are necessary to enable DERS to receive data through EDI. A new term, EDITA (EDI Testing Applicant) is being introduced to reflect that both ESCOs and DER Suppliers– applies to party applying to be certified as Phase I capable.

**NFG ECB Prohibition Order Requirements**

The BWG Chair explained the circumstances unique to NFG due to their support of ESCO Combined Billing. EDI transactions to support having ECB ESCOs communicate HEAP award amounts (and related customer status) to the utility will be needed to 1) determine customer eligibility for ESCO service and 2) determine utility rates/credits applicable to APP customers.

The TWG Chair asked to receive the design requirements so that proposed changes to the EDI Standards could be drafted and presented to the working group.

**Other Business**

None.

**Establish Date/Time for Next Meeting**

The next meeting combined BWG/TWG meeting is scheduled for Friday 1/5/2018 at 10 AM.

**Attendees**

Kim Wall – Hansen Technologies	Veronica Munoz – Accenture
Liz Ciborowski - NYSEG/RGE	Barbara White – Ambit Energy
Gary Lawrence – Energy Services Group	Jennifer Lorenzini – Central Hudson
Diane Neira – NYSEG/RGE	Janet Manfredi – Central Hudson
Eric Heaton – Con Edison	Kris Redanauer – Direct Energy
Jasmine Acosta – CES	Amy Delooza – Agway Energy Services
Mary Do - Latitude	Mike Day – IGS
Jean Pauyo - O&R	Mike Novak – National Fuel Gas Dist.
Dave Parnell – Direct Energy	Thomas Dougherty – Marketwise
Pete Foster – NYSEG/RGE	Rebecca Sweeney – DPS Staff
Barbara Goubeaud – EC Infosystems	Ted Kelly – DPS Staff