

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – January 23, 2015

Administration

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The Draft Minutes from the 12/5/2014 EDI Business Working Group (BWG)/Technical Working Group (TWG) meeting were adopted as Final without modification.
- DPS – Staff is working on the EDI Order for the February 26th Commission Session.

Regulatory Update regarding EDI Matters

- With regard to the anticipated EDI Order, it was noted that while most utilities have been engaged in planning and design for the anticipated changes, that full development of system changes to support implementation is not likely to begin until the Order is issued.
- The February 5th Commission Session may have low income item that could impact EDI development.

Modifications to PSC EDI Web pages

- Due to a change in available support resources, the EDI Working Group web page was moved from the DPS web site (<http://www3.dps.ny.gov/>) to the ASKPSC.com website. It was noted that the existing Working Group web page would be archived on the DPS web site.
- The BWG Chair reviewed a work paper proposing relocation and consolidation of seven EDI oriented links currently accessible from the DPS web site to the ASKPSC.com website. Several of these links have not been maintained and/or are outdated. The general outline of the proposal is as follows:
 - Create one link from the DPS A-Z search page to ASKPSC.com EDI web page.
 - Eliminate the EDI Contest Period web page. It was noted that some components of the web page could be repurposed to EDI Working Group workpapers.
 - Eliminate the EDI Party List webpage.
 - Eliminate the EDI Proceeding Webpage.
 - The current Standards web page would be reformatted into at least two web pages; one for data standards and one for test plans.
 - EDI Proceeding Testing & Certification Page would be moved intact.
 - 98-M-0667 “Home Page” would be moved but would need to be updated in terms of content and staff contacts.

Robin Taylor (DPS) will check to make sure we don’t need Commission Approval to move these items to ASKPSC.com website.

Modifications to Testing Procedures

Utility readiness for Accelerated Switching was reviewed; each utility will implement the new requirements by February 13th although some will implement as soon as the 11th. A workpaper covering various details related to the implementation was reviewed; a new workpaper filling in the details will be developed for the next EDI Working Group meeting.

The BWG Chair reviewed a workpaper that compared the structure of the existing documents and development assumptions concerning the ESCO-Utility role in the exchange of customer data to the

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current structure of EDI that evolved over the past 15 years. As a general matter, EDI Service Providers now play a more prominent role that had originally been envisioned and that from a testing perspective, the ESCO-EDI Service provider role (and in some cases, the Utility-EDI Service Provider role) were more important in terms of the actual exchange of information.

Efforts within the EDI Working Group to date have focused on updating the existing transactions oriented documents but there was general agreement that all parties would be better served with a new testing document that was streamlined to reflect the mature state of EDI within New York.

A sub-group consisting primarily of personnel from EDI Service Providers (the sub group will be open to any interested party) will be formed and report to the EDI Working Group as a standing agenda item. The Testing Sub Group is charged with developing a new set of testing plans that will incorporate many of the testing-oriented concepts discussed during prior meetings such as streamlined testing, batch testing, testing lead time, etc... The BWG Group will communicate offline with EDI Working Group members before the next meeting to get the Testing Sub Group organized.

Enhanced ESCO Service Portability

Giovanni Formato (Con Ed) reviewed the Enhanced ESCO Service Portability transaction that was implemented January 1, 2015. When a customer moves from one residence to another, if the ESCO wishes to retain the same ESCO for their new account, ConEd sends an EDI to the ESCO that functions as an enrollment under the new account number. An 814 Enrollment Response sent to ESCO that contains the new account number, an SP Indicator with additional REF 45 to indicate old account number. If the ESCO does not wish to serve the customer, it may drop the customer but depending upon the timing, the Drop may not take effect until the next billing cycle. Timing can present a challenge because there can be gaps in service (for example, if a customer lives in a temporary situation between the time its old account is closes and service for the new account begins) or overlaps in service (for example, if the customer temporarily has two residences). If the customer does not want to keep their ESCO, the ESCO is sent a drop for the old account and is not advised of the new account. Agway questioned whether the timing of the transaction could impact the rate changes. Con Ed responded affirmatively.

There was some discussion about various implementation and communications issues – ConEd responded that the Order under which the transaction was developed played a significant role in determining the timing. The BWG Chair opined that such discussion might be useful for the Testing Sub Group; perhaps to develop some future guidance. Never the less, regulatory timelines can sometimes override business/technical considerations; i.e. sometimes things happen beyond everyone's control.

The BWG Chair recapped a discussion with DPS Staff during which it was determined there was merit to having utility-specific EDI transactions, such as Enhanced ESCO Service Portability should be included in the New York EDI Standards, even though they would be optional for other utilities. EDI transactions supporting the ESCO Contest Period, also developed by ConEd in response to an Order in 2009, were cited as another example.

Establish date/time for next meeting

The next meeting will be a combined BWG/TWG meeting on Friday 2/6/2015 at 10 AM. Likely topics will include addressing Regulatory Update pertaining to EDI matters (if any), revisions to EDI Testing procedures, ESCO Service Portability and proposed changes to the Commission's EDI web site.

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Attendees

Mary Ann Allen - Integrys	Veronica Munoz - Accenture
Zeno Barnum - Hudson Energy	Mike Novak - National Fuel Gas
Jeff Begley - Fluent Energy	Debbie Rabago - Ambit
Mary Do - Latitude Technologies	Donna Satcher-Jackson - National Grid
Tom Dougherty - Aurea	Joann Siebel - O&R
Giovanni Formato - Con Edison	Sergio Smilley - National Grid
Zoryana Gavrilova - Con Edison	Jim Stauble - Accenture
Barbara Goubeaud - EC Infosystems	Robin Taylor - DPS Staff
Jason Gullo - National Fuel Resources	Cindy Tomeny - National Grid
John Holtz - NRG	Debbie Vincent - UGI Energy Services
Christine Hughey - Constellation	Kim Wall - PPL Solutions
Gary Lawrence - Energy Services Group	Marc Webster - NYSEG/RG&E
Jennifer Lorenzini - Central Hudson	Amy Williams - Agway
Janet Manfredi - Central Hudson	