

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – August 5, 2016

Administration

- Review/Modify Agenda: The Draft Agenda was adopted.
- DPS Staff Remarks: Updated workpapers for the 8/5/2016 meeting were sent out by e-mail and will be posted to the website on Monday 8/8/2016.

Regulatory Update

The New York Electronic Data Interchange Working Group requested a 90 day extension for testing and implementation of the APP Credit EDI changes. The Extension Ruling was issued on 8/2/16 granting an extension of an additional 90 days to December 1, 2016.

The BWG Chair noted that State of New York Supreme Court issued a decision on the resetting case that affirms the Commission has the right to pursue the issues within the Resetting Order but vacated the major ordering provisions because the regulatory process was incomplete. The Court remanded the order back to the Commission. A Press Release from the Commission states that it intends to pursue the issues. The parties have right to appeal order deadline.

Angela Schorr (Direct Energy) questioned whether the EDI Testing extension and the Moratorium Order impacted previous work done with APP Credits. The BWG Chair responded that APP Credits, which had been renamed EPA Credits because the Resetting Order expanded the class of customer who could receive credits, were not a priority because the Moratorium Order does not include provision to provide credits to low income customers. While it's possible some party might seek rehearing on that point, the EDI Working Group will have to wait for the regulatory process to play out. The lower priority for EPA Credit testing and support of the 503 can be revisited if necessary.

The BWG Chair noted that the bulk of moratorium data exchanges are non-EDI (at least initially) but the potential for moratorium-oriented EDI development exists and will be discussed later during the meeting.

Review of Implementation Plans for Current EDI Standards

Updates to Implementation Matrix

- No benchmark items from the 6/30/2016 Report have been identified yet.
- None of the utilities on the call had changes to their items in the matrix.
- Jeff Begley (NOCO) had a question concerning NFG's support of drop code change that will be addressed offline.

Updates to EPA Support Matrix

- Central Hudson update the matrix to reflect they do not plan to support either of the optional segments: AMT Monetary Amount (ESCO Supply Charges) and AMT Monetary Amount (Utility Supply Comparison Charges). They will note this in their EDI Guide.
- The other utilities are still making their design decisions on the 503 transaction and will forward their decisions, if available, before the next meeting.

Low Income Moratorium Order EDI Impact

The Moratorium Order requires utilities are expected to place blocks on the affected accounts within 60 days of the effective date of the Order

- ESCOs will receive rejection notices if they attempt to enroll these accounts
- Some utilities can and may be able to put the blocks in place sooner but are waiting for the rehearing deadline to pass.

Utilities are required in the timeframe to send letters to customers, and are working with DPS Staff on the wording. The letters will be sent after the blocks have been put in place.

Utilities will be required to provide ESCOs with lists of customers they are no longer eligible to serve.

- Staff is aware of the overlap in the timing on the list to ESCOs and the time by which the ESCO has to take action with respect to serving the customer, i.e. to drop the customer.
- While the last meeting focused upon providing a list of all customers with blocks on their account, the list may be limited to just those customers affected by the moratorium.
- Utilities believe they need more direction before they send the lists.

Low Income Moratorium Order Matrix

The BWG Chair and Mary Do (Latitude) have put the matrix on hold for until there is more clarity.

Proposed EDI Changes

Sergio Smilley (National Grid) questioned the if potential new 814C segment reflecting APP status or customer eligibility should have a flag for yes or no, and if it will be implemented through EDI alone or secured files available on utility web sites?

The EDI Working Group discussed various 814C scenarios including notification to the ESCO if a customer loses APP status before the ESCO send an 814D (drop), e.g. if a long-term contract is in place. Particularly for gas customers, timing of HEAP applications/awards will have a significant impact.

At this early stage, support of moratorium-related EDI changes would not be mandatory. In any event, the EDI changes will not be ready before the initial notification to ESCOs. As a result, utilities will have to send customer APP status changes manually (in secure files) until they are able to implement EDI changes if they plan to use EDI. For each utility, the decision to implement EDI will have to be evaluated for cost vs. need and efficiency. The duration of the moratorium is a factor too; there is no termination date on the moratorium.

When an ESCO markets its services to a customer, it will have to verify customer APP status. If the ESCO determines the customer has APP Status, it should not submit an enrollment for the customer. If the ESCO submits an enrollment in error (perhaps because the customer would not reveal its APP status) the utility will send a rejection.

Other Related Matters

Tom Dougherty (Marketwise) raised questions concerning enrollment of a low income customer served through a Community Choice Aggregation (CCA) program. The enrollment code to identify the customer's APP status should not restrict the customer's ability to participate in a CCA. The BWG Chair noted that CCAs have the discretion whether or not they wish to serve low income customers but presuming they do, each utility would have to provide some form of workaround. The issue is better addressed when CCA proposals are presented to utilities.

Other Business

None

Establish Date/Time for Next Meeting

The next meeting will be a combined BWG/TWG meeting on Friday 8/19/2016 at 10 AM.

Attendees

Adam Powers – Ethical Electric	Jimmy Huie - PSEG-LI
Adam Small - Major Energy	John Cooney – National Grid
Alecia Stehnick - Crius Energy	Kandi Terry- Just Energy
Amie Williams – Agway	Kris Redanauer – Direct Energy
Amy Hall - Blue Rock	Mary Agresti- National Grid
Angela Schorr - Direct Energy	Mary Do – Latitude
Barbara White – Ambit	Mike Novak – National Fuel Gas Dist.
Blake Birch – Nordic Energy	Mike Pawlowski – National Grid
Charlie Trick – NYSEG/RG&E	Rachel Frey – Direct Energy
Cindy Tomeny – National Grid	Rick Malek – National Grid
Craig Wiess – National Grid	Rock Carbone – Agway
Debbie Rabago – Ambit	Samantha Curry- Starion Energy
Debbie Vincent – UGI Energy Services	Sergio Smilley – National Grid
Debra Crochie – EC Infosystems	Susan Swiderski- NRG
Donna Satcher-Jackson – National Grid	Tom Dougherty – Marketwise
Erin Horleman - Aurea	Tom Rankin - Marketwise
Ethan Kagan – Direct Energy	Tracie Gaetano – IGS
Gary Lawrence – Energy Services Group	Travis Bickford – Fluent
Janet Manfredi – Central Hudson	Tyler Lones - Aurea
Jean Pauyo – O&R	Veronica Munoz – Accenture
Jeff Begley – NOCO	William Hunsicker- Crius Energy
Jennifer Lorenzini - Central Hudson	