

**Case No. 12-M-0476 et al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Final Minutes – July 28, 2017**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted.
- The Draft Minutes from the 7/14/2017 meetings were adopted as final with modification to the attendance list.
- DPS Staff Remarks: None.

**Regulatory Update**

The State of New York Supreme Court, Appellate Division issued a Memorandum and Order on July 27, 2017 which supports the Commission relative to Resetting Order matter. The Commission needs to respond in some manner to the Memorandum and Opinion before implementation, if any, would begin. For now, there's nothing for the EDI Working Group to do.

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

a. Current EDI Standards Matrix

Central Hudson noted they had implemented changes/updates to the 814C AMT7, 810 and 820 on July 26, 2017. They also implemented the 503 transaction on the same date. Other utilities were asked to update their implementation dates (actual or projected) for the same transactions; National Grid noted that for their KED-LI service territory, the 503 was put into production of 7/26. The 503 has not yet been put into production in Grid's KED-NY service territory.

b. Prohibition Order Matrix

The matrix reflected 7/26 as implementation date. Utilities were ask to provide the codes they use in enrollment response transactions when rejecting ineligible customers and provide more details concerning when updated ineligible lists would be provided. The BWG Chair noted that there were other codes besides CAB and A13, e.g. ANE and ANL, that might be better suited for the enrollment rejection transaction.

**Next EDI Report Filing**

a. 867HIU/MIU Related Updates

- No more errata has been found; the 814C changes for missing codes found during the last meeting are now incorporated into the draft guides.
- Con Ed answered questions about the status of its implementation. Phase III testing is progressing.

b. Filing Date

The BWG Chair noted that the next filing date would likely slip to October 31, 2017. The delay should allow more time for 867 HIU/MIU examples to be prepared.

### **814D – Business Process – Customer Moves/Account Closure**

The BWG Chair reviewed an updated workpaper based upon discussion during the last working group meeting. The workpaper proposed sending of an informational code to the ESCO when the customer notified the utility of a planned move that would lead to closure of the customer's current account. The TWG Chair recommended that NY adopt an 814 MOV as is used in Pennsylvania (for electric); that it would be problematic for NY to provide customer move notifications in a manner different than in other states. The workpaper also changes the description for the 020 code to reflect only that the account had closed; the rationale for removing the reference to a customer move was made to eliminate potential ambiguity about the move date.

After some discussion, it was determined that the 814D Business Process document to focus upon providing the drop transaction for a customer move after the account closes. The BP document should also reflect the practice of informing ESCO customers who are moving within the same service territory and wish to retain the same ESCO of the procedures necessary to accomplish that result. A workpaper will be prepared for the next meeting.

### **814D IG – Prohibition on Termination Fees at Account Closure**

The BWG Chair asked the working group to be ready to make a decision at an upcoming meeting whether or not to proceed with the proposed 814D REF~1P~DEC code.

The short comings of relying upon utility notification were reviewed; National Grid noted customer privacy concerns. Some thought it would still be useful for the utility to use the DEC code to notify the ESCO of a customer death, provided that the customer informed the utility. The BWG Chair asked each of the utilities to contact their attorneys to obtain a determination regarding privacy concerns with asking/sharing customer information (death).

The BWG Chair asked that ESCOs to read through the workpaper so that discussion at the next meeting could address whether there is need for new EDI transaction.

### **Administrative Matter – Update to EDI Working Group Contact List**

The working group contact list was last updated in February 2017. Working Group members were asked to review the list and provide updates before the next meeting.

### **Other Business**

None.

### **Establish Date/Time for Next Meeting**

The next meeting is a combined BWG/TWG meeting on Friday 8/11/2017 at 10 AM.

**Attendees**

Charlie Trick – NYSEG/RGE	Veronica Munoz – Accenture
Debbie Rabago – Ambit Energy	Jeff Begley – NOCO Energy Corp
Juliana Griffiths – National Grid	Elois Anderson – National Grid
Craig Weiss – National Grid	Angela Schorr – National Grid
Deborah Croce – EC Infosystems	Kris Redanauer – Direct Energy
Adam Powers – Clean Choice Energy	Samantha Curry – Starion Energy
Janet Manfredi – Central Hudson	Jean Pauyo – O&R
Jenifer Lorenzini – Central Hudson	Mary Do – Latitude
Liz Ciborowski – NYSEG/RGE	Mike Novak – National Fuel Gas Dist.
Sergio Smilley – National Grid	Amy Delooza – Agway Energy Services
Thomas Dougherty – Marketwise	Rebecca Sweeney – DPS Staff
Travis Bickford – Fluent Energy	Angel Alvarez – Consolidated Edison
Tracie Gaetano - IGS	John Cooney – National Grid
David Parnell – Direct Energy	Kim Wall – Hansen Technologies