

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – April 10, 2015

Administration

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The Draft Minutes from the 3/27/2015 EDI Business Working Group (BWG)/Technical Working Group (TWG) meeting were adopted as Final with modification to the attendance list.
- DPS Staff Remarks – None.

Regulatory Update Regarding EDI Matters

The BWG Chair noted that the April 7 EDI Report was filed and is available from the Commission's DMM website. While the APP Credit EDI changes were effective upon filing; they are not to be implemented until an Order on an anticipated report out of APP Collaborative is issued setting an implementation date. As for the other changes, the BWG Chair believes they are also effective now and could be implemented along with the changes from the March 2 Order in November, however, this will have to be verified with Staff.

Modifications to PSC EDI Web pages

The link to Orange and Rockland's EDI web page containing its Utility Maintained Guides from the Utility EDI Guides web page is now operational. Additionally, a web page has been set up for the May 4 Report containing a grid for the anticipated work products to be filed.

Utility Maintained EDI Guides

The Working Group reviewed a workpaper prepared in response to questions received about what should be in these guides. The BWG Chair stressed the importance of using the Utilities Guides as a supplement to the EDI Standards documents and noted that the links to both O&R and NFG's guides were examples that fell within the guidance of the workpaper.

EC Infosystems raised a question concerning when the guides should be complete. The BWG Chair responded that while there was no specified deadline, logically the guides should be completed before testing begins in September for the November EDI implementation. EC Infosystems expressed a preference for guide to be available by June. The BWG Chair observed there was no requirement for utilities to wait until their guides were complete; work-in-progress versions containing portions of the guide as they become available would probably be helpful.

Other requests for items to be included in the guides included:

- Bill Ready examples and timing details, e.g. when the bill window closes

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- Processing deadlines, e.g. similar to what was prepared for the accelerated switching implementation in February.

The BWG Chair encouraged EDI Service Providers and ESCO to work with utilities to provide feedback on the guides as they are developed. Additionally, items with general applicability should be raised for discussion in working group meetings.

May 4 Report Deliverables

a. Testing Matters

A workpaper was prepared in response to a requirement in the March 2, 2015 EDI Order to streamline the EDI testing process. A Phase I testing proposal was developed with input from DPS Staff but still needs to be reviewed by OGC. Under the proposal, DPS would still require Phase 1 testing for ESCO eligibility purposes but would shift the responsibility for testing to the utilities. The utility could do the test for a fee, or in lieu of a test, accept an affirmation from an established EDI Service Provider as a part of a determination that a test was not necessary. The procedures would have accommodations for new EDI Service Providers or ESCOs with in-house EDI implementations. A suggestion for elimination of Phase I testing was discussed. The BWG Chair suggested that in practice, the usual determination under the proposal will be that Phase I testing is unnecessary. To ensure no barriers to entry, it is important to leave open the process for a new ESCO that wants to implement EDI in-house or for EDI Service Providers not currently serving New York ESCOs.

b. Updates to Existing Transactions

Initial drafts of non-substantive changes, e.g. changes E/M to ESCO and corrections for errata, have been prepared for the 248AA, 568AR, 568 PA, 820, 824 and 997 EDI transactions. When these are reported to the Commission, every NY EDI Standards documents will have been updated for changes originally directed in the February 2014 Order.

c. New Transactions related to APP Credits

The April 7 EDI Report noted that further EDI development could be beneficial with regard to APP Credits; particularly an EDI transaction to provide account level utility full service billing amounts to ESCOs for the APP Credit calculation. There were no proposals prepared for today's meeting but proposals based upon past discussion will be sought.

d. Other

The BWG Chair disclosed a conversation with Staff concerning the deadline for the next EDI report to the Commission (May 4). In consideration of further APP Credit oriented development and a related collaborative, a delay in the report deadline may be sought.

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Establish date/time for next meeting

The next meeting will be a combined BWG/TWG meeting on Friday 4/24/2015 at 10 AM.

Attendees

Mary Agresti – National Grid	Jeff Begley – NOCO
Carla Marquez – Customized Energy Solutions	Chrissy Deloughrey – Energy Services Group
Mary Do – Latitude Technologies	Thomas Dougherty – Aurea
Joe Falcon – Ambit Energy	Julie Goodchild – Direct Energy
Barbara Goubeaud – EC Infosystems	Jason Gullo – National Fuel Resources
Eric Heaton – Con Edison	Christine Hughey – Constellation
Gary Lawrence – Energy Services Group	Brian Meredith – IGS Energy
Veronica Munoz – Accenture	Mike Novak – National Fuel Gas
Jean Pauyo – O&R	Debbie Rabago – Ambit Energy
Kris Redanauer – Direct Energy	Patricia Reno – TransCanada
Jay Sauta – Agway	Denise Shaw – TransCanada
Sergio Smilley – National Grid	Robin Taylor – DPS Staff
Kandi Terry – Just Energy	Jay Tompkins – Central Hudson
Charlie Trick – NYSEG/RG&E	Marie Vajda – NYSEG/RG&E
Jennifer Vigil – Champion	Craig Wiess – National Grid
Amie Williams - Agway	Jasmine Thom – Customized Energy Solutions
Janet Manfredi – Central Hudson	