

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – August 29, 2014

Administration

- Review/Modify Agenda: The Draft Agenda was adopted.
- The 8/22/2014 Draft Minutes were adopted without modification as Final.
- DPS – no remarks.

EDI Modification Priority Planning

The updated spreadsheet was reviewed. The changes to the spreadsheet primarily reflected the ongoing technical work as well as noting where further development was dependent upon further feedback or guidance.

Update on EDI Outreach Communication to REMS forum

The BWG Chair discussed the email circulated via the REMS email list that provided a progress report and a discussion of the anticipated contents of the October EDI Report filing. Only one response, which was generally supportive of the direction proposed, has been received. The deadline to provide informal comments is extended to September 4, 2014. The BWG will further responses during meetings in early September in preparation of the October EDI Report.

Technical Working Group Discussion

The BWG Chair explained that while the number of posted documents is large, only the “Draft Change” documents will be discussed. These documents reflect only the changes since the prior meeting. “Draft Change – Summary” documents reflect all proposed changes relative to the existing standards are provided primarily for reference.

Within the Draft Change documents, there appear to be a lot of changes but most as not substantive, e.g. revisions to change “E/M” or “ESCO/Marketer” to ESCO. The substantive changes will be reviewed during the meeting.

The TWG Chair then proceeded to review the Draft Changes to the IGs which included new examples at the end of each IG. Gary Lawrence reviewed the first draft of changes to the corresponding Data Dictionaries. Since this is the first time proposed changes to the Data Dictionaries are being presented, everyone should review carefully. Changes/corrections should be sent to the Working Group Chairs as well as to Mr. Lawrence and Mr. Dougherty.

Workpaper - 867 Historical Usage IG and Data Dictionary - Draft Changes

- On page 62 , for Segment: PTD Product Transfer and Resale Detail (Additional Information), the note will be reformulated to more clearly state that the data in the PTD*FG loop will be sent, even in cases where there is no historic usage, but that no data will be sent.
- With the data dictionaries, the changes conform to the changes in the IGs.
 - PTD*FG was shown as PTD*FJ; this is a typographical error which will be corrected.
 - The Transaction Set Trailer shown on row 149 will be relocated to the second last row.

Workpaper - 814 Historical Usage IG and Data Dictionary - Draft Changes

- On page 12, for the Segment: REF Reference Identification (Reject Response Reasons), as a follow up to last week's discussion FNA (Fee Not Authorized) was removed. There was no opposition.
- There were relatively few changes to the Data Dictionary

Workpaper - 814 Enrollment IG and Data Dictionary - Draft Changes

- On page 5, for the Segment: REF Reference Identification (Reject Response Reasons), the deleted text went beyond the intended changes related to ESCO Referral programs.
 - The text will be modified to reflect that the word "MANUAL" may still be sent; this is something that should be noted in a Utility Maintained EDI Guide.
- On page 8, for the Segment: N1 Name (Customer), Ref. Des. N106 will be changes from Conditional to Optional.
- The example on page E-17, which deals with ECO Referral Programs, will be removed.
- In the Data Dictionary, references to REF~0N will be removed and SIC/NAISC will be changed to Industrial Classification Code.

Workpaper - 814 Change IG and Data Dictionary - Draft Changes

- On pages 25-26, for the Segment: REF Reference Identification (Reason for Change - Account Level), and page 28 for the Segment: REF Reference Identification (Utility Account Number), utility specific references will be modified.
- On page 57, the Segment: AMT Monetary Amount (Electric Capacity Assignment) will be renamed AMT Monetary Amount (ICAP Tag),
- For the same segment, an optional Ref. Des. AMT03 will be added to reflect adjusted tags, e.g. NYPA adjustments.

Con Edison questioned whether the current EDI Standards would be available from PSC web site after the new Standards are formally adopted. It was generally agreed to that access to older versions of the EDI Standards could be helpful so the BWG Chair will check with DPS Staff to see if an EDI Standards Historical Archive web page could be created.

It was noted that many segments throughout the Draft IGs, Syntax Notes and Semantic Notes appeared to not be applicable the indicated segments. This approach appears to result from a "cut and paste" error several versions ago. It was noted that PJM's EDI guides leave the Syntax Notes and Semantic Notes blank unless they apply to the indicated segments. The boilerplate notes are a result of using the Foresight tool to create the IGs (the notes are required by Foresight).

- There are advantages to using this tool and New York's Phase I Certification process may be dependent upon Foresight.
- The BWG Chair will call John D'Aloia at DPS regarding Phase I Certification process.
- If this is not an impediment, there will be one more round of discussion at the next working group meeting before a formal decision is made to edit/prepare documents in Word format.

Task Assignments

The BWG Chair asked for volunteers to begin review of the Business Process Documents to make changes that conformed to the new IGs. A first set of draft changes to the EDI Glossary will be presented at next week's meeting.

Priority I A Discussion

There were no updates since last week's meeting.

Priority II Discussion

There were no updates since last week's meeting.

Priority III Discussion

There were no updates since last week's meeting.

Establish date/time for next meeting

The next meeting will be a combined BWG/TWG meeting on 9/5/14 at 10 A.M. The primary focus will be technical development, as appropriate, for the Phase I items.

Attendees

Zeno Barnum – Hudson Energy	Jeff Begley – Fluent Energy
Mary Do – Latitude Technologies	Tom Dougherty – ISTA
Jennifer Lorenzini – Central Hudson	Mary Ann Allen – Integrlys
Joe Falcon – Ambit Energy	Jason Gullo – National Fuel Resources
Veronica Munoz – Accenture	Giovanni Formato – Con Edison
Jim Stauble – Accenture	Gary Lawrence – Energy Services Group
Sergio Smilley – National Grid	Jay Sauta- Agway Energy Services
Mike Novak – National Fuel Gas	Charlie Trick – NYSEG/RG&E
Rick Tra – National Grid	Debbie Rabago – Ambit Energy
Kandi Terry – Just Energy	Kim Wall – PPL Solutions
Maureen Nati – DPS Staff	Robin Taylor – DPS Staff