

BUSINESS PROCESSES – PRICING HISTORY EDI WORKING GROUP WORKPAPER 6/26/2015

This document describes the detailed business processes for requesting customers' Pricing History data in the State of New York. In developing these business processes, the content of the following documents was considered:

- Order Taking Actions to Improve the Residential and Small Nonresidential Retail Access Markets, issued and effective February 25, 2014 in Case 12-M-0476 et.al.
- Order Granting and Denying Petitions for Rehearing In Part, issued and effective February 6, 2015 in Case 12-M-0476 et.al.

NOTES:

- References to the text of the Uniform Practices displayed in the Process Rules sections in this document are those Practices that are relevant to the scope of the business processes being described in this document and incorporated, by reference, into this document are a verbatim quotation from the Errata Notice issued in Case 98-M-1343 on August 2, 2004. Those Practice(s) that require elaboration, clarification, or interpretation in light of other EDI standards or modification to accommodate EDI data exchange processes will be displayed in the Process Rules section AND will also be highlighted in the Comments/Recommendations/Issues section.
- Any item displayed under a Process component, i.e. rules; etc. is also applicable for its sub-processes, unless otherwise noted.
- To help ensure accurate ESCO calculation of Account Program Participant billing credits as described in the Order listed above, utilities should provide ESCOs with full-service (utility provided supply and delivery service) billing amounts for the months during which the ESCO was the customer's supplier. For comparison purposes, the full-service utility amounts should reflect only current charges for the months requested, i.e. late payment charges and other charges that cannot be classified as monthly supply or delivery charges should be excluded from the amount provided.
 - Use of the 503 EDI Transactions is at the discretion of the utility; a utility may use non-EDI options such as a secured web site to provide full-service billing amounts to ESCOs. A utility's support of the 503 transaction should be designated in its Utility Maintained EDI Guide.
- All Customer information is considered confidential.
- A separate Pricing History Request must be received for each commodity, (i.e. electric or gas).
- For purposes of validating initial and subsequent EDI transactions, the ESCO must provide the customer's utility account number (with check digit, if included). If the utility account number is not sent, the drop request will be rejected.
- The source of various Process Rules and Recommendations listed in this document is indicated by the following annotations which precede each rule:
 - [UBP] = NY Uniform Business Practices
 - [CWG] = Collaborative Work Group or Case 12-M-0476 EDI Working Groups¹

¹ The processes contained herein were reviewed and updated by the Case 12-M-0476 EDI Working Groups.