I.   Proposed Change Request Examples:

New York EDI Change Request 01

Requester's Name: Kris Redanauer	LDC/ESCO Name: Direct Energy	Phone # :
Date of Request: 10/17/16	Affected EDI Transaction Set #(s): 814D	E-Mail Address:
Requested Implementation Date:		Status:

Brief Explanation

Governor Cuomo signed legislation that prohibits providers of telephone, cellular telephone, television, internet, energy or water services from imposing a termination or early cancellation fee if a customer has deceased before the end of such contract. Every violation would be punishable by a civil penalty of $1000. The bill took effect on September 27.

For example - if a relative contacts us to cancel we can certainly waive the fee. If they however contact the utility, we have no way of knowing about the deceased customer and would therefore only receive a drop transaction. If we then bill the early termination fee we could be in violation. Perhaps an EDI code would do the trick?

Detail Explanation (Exactly what change is required? To which Implementation Guides? Why?):

This change establishes a uniform standard for reporting an account closing due to a death. We would like to have new reason code added to the REF*1P segment (REF*1P*DEC) so that the ESCO will know that any early termination fees are to be waived.

Cost Justification

Benefits	*Should be completed by initiating party. Will be added to by others during the evaluation of Change Control.* By adding new code in an existing segment, we will be cutting down on the cost of mapping for all parties involved.
Implementation Cost	*Will be completed (high level estimate only) if it is agreed Change Control is worth pursuing.*
Incremental Ongoing Costs	*Will be completed (high level estimate only) if it is agreed Change Control is worth pursuing.*

For Change Control Manager Use Only:

Date of NY Discussion:	Expected Implementation Date:	

NY Discussion and Resolution:

Segment:	**REF** Reference Identification (Drop Reason and Initiating Party)
Position:	030
Loop:	LIN Optional (Must Use)
Level:	Detail
Usage:	Optional (Must Use)
Max Use:	1
Purpose:	To specify identifying information
Syntax Notes:	1 At least one of REF02 or REF03 is required.
	2 If either C04003 or C04004 is present, then the other is required.
	3 If either C04005 or C04006 is present, then the other is required.
Semantic Notes:	1 REF04 contains data relating to the value cited in REF02.
Notes:	Request: Required
	Response: Not Used
	REF~1P~B38
	REF~1P~020
	REF~1P~A13~MAIL RETURNED

Data Element Summary

	Ref. Des.	Data Element	Name	Attributes
Mand.	REF01	128	Reference Identification Qualifier	M ID 2/3
			1P Accessorial Status Code	
			Warnings associated with an accept status notification	
Must Use	REF02	127	Reference Identification	X AN 1/30
			020 Customer Moved or Account Closed	
			Originates with the Utility.	
			A13 Other	
			See explanation in REF03.	
			May originate either with the ESCO or the Utility.	
			B38 Dropped	
			(ESCO Initiated)	
			Customer was dropped by the ESCO.	
			CHA Customer Changed to Another ESCO	
			Upon Customer request:	
			• Sent by Utility to incumbent ESCO in response to pending switch to another ESCO.	
			• If supported by Utility, sent by the Incumbent ESCO to request cancelation of a pending switch to another ESCO.	
			CHU Customer Changed to Full Utility Service	
			Sent by Utility to Incumbent ESCO in response to customer request to return to full service.	
			DEC Customer Account Closed - Customer Deceased.	
			Originates with the Utility - Account closed due to death of Customer.	
Cond.	REF03	352	Description	X AN 1/80
			Additional text information to aid in explaining the reason for a drop.	

New York EDI Change Request 02

Requester's Name:	LDC/TPS Name:	Phone # :
Date of Request: 11/4/16	Affected EDI Transaction Set #(s): **867HU**	E-Mail Address:
Requested Implementation Date:		Status:

Brief Explanation (This will be copied into the description in the Change Control Summary Spreadsheet):
Proposed Addition of Bill Cycle Code to 867HU

Brief Explanation

Proposed Addition of Bill Cycle Code to 867HU

Detail Explanation (Exactly what change is required? To which Implementation Guides? Why?):
For a large commercial account, the 867HU is requested prior to contracting. Having the REFBF segment included on the 867, this will help allow for a more accurate pricing for a customer who is billed quarterly versus a customer who is billed monthly.

Cost Justification

Benefits	*Should be completed by initiating party. Will be added to by others during the evaluation of Change Control.*
Implementation Cost	*Will be completed (high level estimate only) if it is agreed Change Control is worth pursuing.*
Incremental Ongoing Costs	*Will be completed (high level estimate only) if it is agreed Change Control is worth pursuing.*

For Change Control Manager Use Only:

Date of NJ Discussion:	Expected Implementation Date:	

NY Discussion and Resolution:

Case No. 12-M-0476 et al.
EDI Business/Technical Working Groups
Proposed Addition of Bill Cycle Code to 867HU
11/4/2016

NY 867 Consumption History/Gas Profile *Question: Should this be applicable to the gas profiles too?*

Segment:	**REF** Reference Identification (Bill Cycle Code)	*Comment: This is the segment name used in the 814E.*

Position:	030
Loop:	LIN Optional (Must Use)
Level:	Detail
Usage:	Optional (Dependent)
Max Use:	1
Purpose:	To specify identifying information
Syntax Notes:	1 At least one of REF02 or REF03 is required.
	2 If either C04003 or C04004 is present, then the other is required.
	3 If either C04005 or C04006 is present, then the other is required.
Semantic Notes:	1 REF04 contains data relating to the value cited in REF02.
Notes:	Required *Question: This is required for the 814E; can/should it be required for 867?*
	REF~BF~18
	REF~BF~17~MON

Data Element Summary

Mand.	Ref. Des.	Data Element	Name	Attributes
Mand.	**REF01**	**128**	**Reference Identification Qualifier**	**M ID 2/3**
			BF Billing Center Identification	
			Billing cycle. Cycle number indicating when this customer is scheduled for billing.	
Must Use	**REF02**	**127**	**Reference Identification**	**X AN 1/30**

A 2 digit code indicating when a scheduled bill is prepared for the customer. Some companies may bill on a cycle other than the read cycle. In this case this code could be used to retrieve the scheduled billing date from the utility's web site. *Comment: I think everyone uses REF*BF and REF*65 interchangeably, with NYSEG/RGE putting a prefix (N/R) on the REF*65. Both fields end up mapping to the published Meter Reading Schedules and the schedules are all 2 digit numbers, so the BF segment seems like the right one to use but the description on the 65 segment is slightly more descriptive. At the end of the day it is probably best to just have them match, as opposed to writing up a completely new description.*

Cond.	REF03	352	Description	O AN 1/80
Cond.	**REF03**	**352**	**Description**	**O AN 1/80**

When present, indicates the frequency with which the account is billed by the utility. This element should be sent in a~~n accept~~ Historical Usage/Gas Profile ~~response~~ transaction ~~to an enrollment~~ request ~~~~when information regarding the bill cycle codes on the web site or the data sent in REF02 is insufficient to describe both when and how frequently the account ~~being enrolled~~ is scheduled to be billed. *Comment: Redlines are relative to 814E text. Question: This element is in the 814E but should it be excluded in the 867? Billing frequency is neat information, but it's probably not super important during the historical usage business process. I suppose you could argue that a meter that is getting billed every quarter probably has higher credit exposure which is valid information for suppliers to have. Also, as above, should this apply to gas profiles?*

BIM	Bimonthly	
MON	Monthly	
QTR	Quarterly	

II.   Proposed web page to track processing of NY EDI Change Requests:

New York EDI Change Control Log						Updated: 3/24/2016
ID #	Requestor	Company	Date Requested	Trans Set(s)	Description	Status
01	K. Redanauer	Direct Energy	10/17/2016	814	Adding a new code (DEC) to the REF1P segment to notifiy ESCO of drop due to death of account holder.	Open.
02			11/4/2016	867HU	Adding the REFBF segment to the 867HU	Open