

**Case 12-M-0476, et. al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Final Minutes – September 26, 2014**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The 9/12/2014 Draft Minutes were adopted as Final without modification.
- DPS – no remarks.

**EDI Modification Priority Planning**

The spreadsheet was not updated this week but it was noted that it would have been similar to the spreadsheet presented at the 9/12/2014 meeting.

**Technical Working Group Discussion**

Mary Do and Gary Lawrence, lead the technical review of modifications to Implementation Guides & Data Dictionaries, respectively. It was noted that an effort will be made to ensure that segment names and descriptions/language are used consistently through each of the IGs and DDs. For example, cases where “class shape” has been used will be changed to “class load shape”.

Significant decisions/Discussion points were as follows:

- Even though the Foresight EDISM tool will not be used to prepare the IGs, the TWG’s intention is to maintain X12 compatibility. As such, the IGs will contain standard terminology and language will be provided within the “gray boxes” redefine and/or explain the terms within the context of the NY EDI Standards.
- There was discussion concerning whether the HUU code in the 814HU Response was sufficient for cases where data would be provided in the PTD\*FG loop but no usage data would be provided. Kim Wall suggested an HUL (Historic Usage Limited) code for this scenario. The HUU code would then be provided in fewer cases than what is done currently; i.e. only when there is no data (usage or non-usage) to be provided for an otherwise valid account.
- There was extended discussion concerning the proposed pre-enrollment provision of items in the 867HU PTD\*FG loop, i.e. whether due to the anticipated low volume of transactions, a non-EDI approach such as email might be more appropriate. The BWG Chair expressed concern about changing the approach so close to the October Report because 1) a change of this magnitude probably should have been communicated in the REMS letter and 2) removing the PTD\*FG loop would significantly alter the IGs and Data Dictionaries.
  - To preserve the IG and DD work, it was suggested that the EDI be optional for these items.

- The BWG Chair planned to contact DPS Staff to discuss the feasibility of this approach for the October 2014 EDI Report.
- It was suggested that it would be helpful if every utility provided an example of their implementation of the EDI transactions for the guides. After some discussion, it was determined that the examples should be provided in the Utility Maintained EDI Guides.

## **EDI Glossary**

The BWG Chair reviewed two minor formatting modifications to EDI Glossary; the Glossary is essentially ready for the October 2014 EDI Report.

## **Business Process Documents**

The BWG Chair discussed the question of the standard number of usage to be provided in response to and 814HU request and the impact the answer had upon the draft revisions to the 814HU Business Process document. Based upon some anticipated off-line development work, draft revisions to Business Process Documents for the 814HU, 814E and 814C transactions will be posted for next week's meeting.

## **Test Plans**

Modifications to Test Plans have not been started yet.

## **Internet Electronic Transport mechanism**

The BWG Chair will draft language for the October 2014 EDI Report that will change the NY standard from GISB 1.4 to GISB 1.6, but grandfather existing GISB implementations. Utilities will be required to identify which version(s) they support in their Utility Maintained EDI Guides. Effectively, they would be no cutover date but when utilities were ready to support/implement GISB 1.6 they would update their Guides and coordinate the transition with ESCOs and/or their EDI Service Providers.

## **NYPSC EDI Web Page Review**

The BWG Chair said the October 2014 EDI Report will contain a limited number of straight-forward recommendations, e.g. elimination of the EDI Party list web page but that most of the proposed revisions will be developed by the EDI Working Group following filing of the Report.

## **Discussion/Update on non-Priority I items**

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 10/3/14 at 10 A.M. The primary focus will be technical development for the Phase I items; finalizing the work products in preparation for the October 23, 2014 Report filing.

**Other Discussion**

Regarding issuance of 820 transactions, Gary Lawrence asked if TRN trace numbers should be unique each they are sent. He noticed that Grid will repeat the numbers if a negative balance is being carried but was unsure of the practices used by other utilities. NYSEG/RG&E said they issue unique TRNs because they hold the 820s until credit is eliminated. NFG and Central Hudson said they needed to investigate.

**Attendees**

Zeno Barnum – Hudson Energy	Mary Do – Latitude Technologies
Tom Dougherty – Aurea Energy Services	Giovanni Formato – Con Edison
Jason Gullo – National Fuel Resources	Gary Lawrence – Energy Services Group
Veronica Munoz – Accenture	Mike Novak – National Fuel Gas
Jay Sauta – Agway Energy	Sergio Smilley – National Grid
Robin Taylor – DPS Staff	Rick Tra – National Grid
Charlie Trick – NYSEG/RG&E	Kim Wall – PPL Solutions
Jeff Begley – Fluent Energy	Janet Manfredi – Central Hudson
JoAnne Siebel – O&R	