

**Case No. 12-M-0476 et al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Draft Minutes – March 16, 2018**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted.
- The Draft Minutes from the 3/2/2018 meeting were adopted as final without modification.
- DPS Staff Remarks: None.

**Regulatory Update**

No regulatory action directly impacting EDI since the last working group meeting has occurred.

**Updates to EDI Implementation Plan(s)**

a. Current EDI Standards Matrix

The BWG Chair reviewed changes since the last meeting. Jean Pauyo (Orange & Rockland) noted that they have now completed the application process for DER Suppliers to access customer information via EDI. No other utility updates were provided.

The BWG Chair noted that he had received a request that starting with the next EDI Report filing, that a separate report matrix to track implementation of changes by segment for each utility be set up. This will be discussed during a future Working Group conference call.

**April 30, 2018 Report Preparation Update**

The latest draft versions of all the EDI Standards documents are on posted on the EDI Report Preparation web page. Since the last meeting no comments have been received. The March 30, 2018 EDI Report date is being delayed to April 30, 2018.

**DERS related EDI changes**

Updated 814C and 814E data dictionaries have been posted on the EDI Report Preparation web page since the last meeting; no comments have been received. Further DERS related edits to the Business Process Document may be forthcoming.

**NFG ECB Prohibition Order Requirements**

The BWG Chair reviewed an updated workpaper with a change in approach regarding how ECB ESCOs report HEAP payments to utilities. Separate 814C segments (AMT\*B1 and AMT\*BK) will be used for Basic and Emergency payments which eliminates the need for use of REF03 in the new 814C REF\*5E segment. Further, the REF\*5E will now only be sent, on an optional basis, by Utilities to ESCOs.

As for the new 814E REF\*5E segment, the BWG Chair clarified that it would be required for enrollment accept responses to ECB ESCOs but optional to ESCOs using UCB or Dual

models to bill their customers. Further, if an ESCO did not have a waiver to serve otherwise ineligible customers, they would not receive a REF\*5E segment because instead they would be receiving an enrollment rejection response with the CAB code. For ESCOs that had a waiver to serve otherwise ineligible customers, the REF\*5E segment would either confirm or not confirm what the customer had told the ESCO prior to enrollment. Where REF\*5E did not confirm what the ESCO expected, it would serve as business information that could lead to a subsequent transaction.

The BWG Chair pointed to the updated example on the last page of the workpaper; the corresponding new example in the IG will reflect these updates. Additionally, updated data dictionaries will be posted on the EDI Report Preparation web page.

In response to a question from Liz Ciborowski (NYSEG/RGE), the BWG Chair confirmed that the charges under discussion were mandatory for ECB but optional for other billing models. Additionally, relative to past privacy concerns, because communications of APP Status were post-enrollment, nothing was being sent to the ESCO that they were not already receiving via the utility-provided ineligible customer lists.

#### **ESCO Bill Credits to non-APP Customers**

The BWG Chair reviewed an updated workpaper. With respect to the 814C AMT\*7 segment, the section highlighted yellow was primarily discussed last week but an additional qualifier “when received via AMT segment” is new.

With respect to the 814C REF\*UJ segment, there is nothing substantially different from what was discussed during the last meeting. The gray box noted was updated to remove some “holdover language” that was no longer necessary.

For the 814C REF\*TD segment, the BWG Chair noted that there was some confusion between the changes presented in this workpaper and those changes to the segment in the NFG ECB Prohibition Order Requirements workpaper. To clarify, changes from both workpapers will be reflected in the new IG.

As pertains to the 814 C REF\*7G –segment, the new yellow highlighted language was clarifying language discussed last week. The BWG Chair noted there might be some variability in the implementation by utility; when there’s no POR stream either the ECB or IF code is accurate in a rejection response as the rationale for not processing the credit.

With the 810 UBR SAC segment, a modification to CRE030 gray box note to reflect that it pertains to GSP Credits is provided. No other new codes are necessary; other codes currently available are adequate for other adjustments.

Moving on to the 820 RMR Segment, changes to gray box notes are made throughout to reflect GSP Credits; a “holdover” ESCO Generic Credit reference will be removed. Otherwise, changes reflected the TWG Chair’s instruction to align the requirements for rate ready utilities

with existing requirements for bill ready utilities. Effectively, no separate line item will be required for the generic ESCO credits.

### **Other Business**

Jean Pauyo suggested that Utility Response for the new 814C segments that the IG be modified to require an “echo back” of the changes submitted by the ESCO. He said this would be consistent with similar responses for rates (some rate ready utilities use 814C transaction to accept rate changes). The BWG Chair was concerned that most segments require no response from the utility and that corresponding changes to implement specific requirements for each segment would take time to develop. A front matter note that could potentially include a table listing applicable segments for which a utility-optional response could be provided might be a more time-effective approach. Limiting additional utility response requirements was posed as another alternative but if some utilities provided responses for other existing segments, the result could be more confusion.

This item will be discussed at future working group meetings to determine the best way forward.

### **Establish Date/Time for Next Meeting**

The next meeting combined BWG/TWG meeting is scheduled for Friday 4/6/2018 at 10 AM.

### **Attendees**

Mary Do – Big Data Energy	Debbie Rabago – Ambit Energy
Juliana Griffiths – National Grid	Jennifer Lorenzini – Central Hudson
Gary Lawrence – Energy Services Group	Janet Manfredi – Central Hudson
Kim Wall – Hansen Technologies	Ana Harley - Accenture
Craig Weiss – National Grid	Samantha Curry – Starion Energy
Sergio Smilley – National Grid	Amy Delooza – Agway Energy Services
Kris Redanauer – Direct Energy	Mike Day – IGS
Jean Pauyo – O&R	Mike Novak – National Fuel Gas Dist.
Angel Alvarez – Con Edison	Thomas Dougherty – Marketwise
Pete Foster – NYSEG/RGE	Rebecca Sweeney – DPS Staff
Barbara Goubeaud – EC Infosystems	Travis Bickford – Fluent Energy
Jeff Begley – NOCO	Diana Neira – NYSEG/RGE
Emilie Cimoli – Clean Choice Energy	David Parnell – Direct Energy
Liz Ciborowski – NYSEG/RGE	Jasmine Acosta – Customized Energy Solutions