

	Requirement	Milestones						Project Plan					
		Determine EDI Transactions to Revise	Revise New York Implementation Standard	Revise Utility Specific Supplemental Guidelines	Update Data Dictionaries	Business Process Documents	Test Plans	Notes / Comments / Follow Up's	Next Action	Status	Responsible Party	Start	Finish
Priority I	<b>Enrollment Rejection Codes:</b>  When a utility rejects an EDI enrollment, the utility provides a reason code.	814 HU Response	In progress	In progress	In progress				None	Open			
	<b>ICAP Tag:</b>  A specific prospective customer's Installed Capacity (ICAP) tag, which indicates the customer's peak electricity demand.	867 HU [PTD*FG]  814 C / 814 E	In progress	In progress	In progress			The DTM is included in the 814C. The DTM is not in the 814E.	None	Open			
	<b>Meter Numbers:</b>  Customer's number of meters and meter numbers.	867 HU [PTD*FG]	In progress	In progress	In progress			Meter numbers must be provided in the 867 HU PTD*FG loop.	None	Open			
	<b>Number of Meters:</b>  Customer's number of meters and meter numbers.	867 HU [PTD*FG]	In progress	In progress	In progress			Number of meters must be provided in the 867 HU PTD*FG loop.	None	Open			
	<b>Account Settlement Indicator:</b>  Whether the customer's account is settled with the ISO utilizing an actual 'hourly' or a 'class shape' methodology.	867 HU [PTD*FG]  814 C / 814 E	In progress	In progress	In progress				None	Open			
	<b>NYPA / Recharge NY Indicator:</b>  Whether the customer receives any special incentives from the New York Power Authority.	867 HU [PTD*FG]  814 C / 814 E  OR   Utility Website	In progress	In progress	In progress			Determine if this data can be provided outside of EDI since we have determined that there is a list that is made available to ESCOs. Input sought in REMS letter.	Determine which transaction will be used considering input from REMS letter.	Open			
	<b>Utility Discount Indicator:</b>  Whether the customer receives any special delivery or commodity "first through the meter" incentives.	867 HU [PTD*FG]  814 C / 814 E	In progress	In progress	In progress			Does it apply to discounts on delivery or commodity.  Is it assumed that it is applicable to non-residential customers only.	REMS letter proposes only indicating whether discount is dependent upon customer purchasing commodity from Utility. Determine in consideration of input from REMS letter.	Open			
	<b>Industrial Classification Code:</b>  The customer's Standard Industrial Classification (SIC) code.	867 HU [PTD*FG]  814 C / 814 E	In progress	In progress	In progress					Open			
	<b>Tax Exempt:</b>  Whether the utility identifies the customer as tax exempt.	867 HU [PTD*FG]  814 C / 814 E	In progress	In progress	In progress					Open			
	<b>Customer Supply Status:</b>  Whether the customer is served by utility or another ESCO.	867 HU [PTD*FG]	In progress	In progress	In progress					Open			

NY EDI Working Groups - Workpaper  
Order CASE 12-M-0476 - Proceeding on Motion of the Commission to Assess  
Certain Aspects of the Residential and Small  
Non-residential Retail Energy Markets in New York State.

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Priority I a	<b>Energy-related value-added service indicator:</b>  The ESCO to provide information identifying whether the customer is purchasing an energy-related value-added service and the nature of that service.							Energy related value added services needs to be defined.  More discussion is required. REMS letter proposes deferral until more input is provided by PSC.	Review responses to REMS letter.	Pending			
	<b>Low Income Status:</b>  Provide a field for information on the customer's low income program enrollment status.							Customer privacy policies need to be developed.  Item has been Stayed as of 4/25/2014	Stayed by 4/25/2014 Order.	Wait for PSC action.			
	<b>ESCO Credit:</b>  Provide any required refund as a credit on the customer's bill.							EDI Optional. Issue has been stayed as of 4/25/2014.	Stayed by 4/25/2014 Order. Need to understand how other Rate Ready utilities are going to plan for this.	Wait for PSC action.			
Priority II	<b>Full Service Bill Comparison:</b>  ESCO must be able to compare actual customer bills to what the customer would have been billed at the utility's rates and, on at least an annual basis.							EDI Optional  The Utilities need to understand how the ESCOs will use this information and how often they will require it. Indirectly dependent upon items Stayed by 4/25/2014 Order.	Meet with ESCOs to determine how this will be used. Discussed in REMS letter.	Pending			
Priority III	<b>NYSERDA</b>  Inquiry from the Governor's Office about the provision of data to NYSERDA via EDI.	867 HU						Utilities would like to receive an official document. An official PSC letter or Order addressing what NYSERDA.	NYSERDA will use 867 HU & 814 HU Request/Response.	NYSERDA and utilities are negotiating TPAs.			
	<b>Net Metering Indicator</b>  EDI modifications T.B.D.							Minimally, would addition of a Net Metering Indicator be helpful? This is not a requirement, no discussion has taken place, this is just a place holder.	N/A	N/A			