

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – October 23, 2015

Administration

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The Draft Minutes from the 10/9/2015 EDI Business Working Group (BWG)/Technical Working Group (TWG) meeting were adopted modified to correct the date for the draft minutes.
- DPS Staff Remarks
 - None - Staff was not present.

Regulatory Update

The BWG Chair noted that in the Community Distributed Generation Proceeding an Energy Usage Data Subcommittee had been formed. Some believe EDI might have a role.

Review of Implementation Plans – Discussion on timing, etc

A workpaper showing the implementation matrix was discussed. There was only one minor update with respect to the 11/2/2015 EDI Changes. An Order on the 7/24/2015 EDI Report was not issued at the October PSC Session so there were no changes to that section of the workpaper.

Utility Supported EDI Transactions

A workpaper showing a matrix of which EDI transactions were supported by each utility was reviewed. There were no additional changes.

ICAP Tag Discussion

a. Testing Example Questions

It was noted that some utility test plans included examples without ICAP Tags but during the call all electric utilities confirmed they will use EDI to communicate ICAP Tag changes. The BWG Chair suggested that those concerned with testing plans contact the utilities directly.

b. Proposed 814E AMT Future ICAP 8B segment

The latest workpaper reflects the changes discussed during the last meeting – there were no additional questions. Jay Zhang questioned how far in advance utilities become aware of future ICAP Tags. The TWG Chair noted that at least in other states, the timing depended when the utility calculated the ICAP Tag. Grid said they issue the future ICAP Tags as soon they are available. It was noted that new ICAP Tags become effective May 1; Charlie Trick said the future ICAP Tags for NYSEG/RG&E start to become available in March.

With respect to the 814C transactions, there was no need for a Future ICAP Tag segment because ICAP Tag Changes are provided with effective dates.

It was noted that there was some confusion about which ICAP Tags were being provided for enrollment responses near the May 1 ICAP Tag transition date. The BWG Chair suggested that each utility clarify its procedures in their EDI Guides.

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c. 867 HU Quantity (ICAP) Segment Questions

Questions were raised offline about whether the notes in the 867 HU IG should reflect two QTY*KZ loops. The TWG Chair reviewed a workpaper with a modification to the example in the note. During discussion, additional changes to various segment notes were proposed. Daniel Stier recommended including an example for use of the AJ code (Adjusted Kilowatt Demand) to address situations where for example, a NYPA adjustment had been applied and quantity provided represents the remaining capacity.

These changes will be developed offline and a new workpaper will be presented at the next meeting.

Proposed addition of REF*BLT segment to the 867MU

NYSEG/RG&E requests that this segment not be mandatory. The workpaper for the new segment will be updated to reflect such and discussed at the next meeting. Utilities should indicate in their EDI Guides whether or not they'll support the new segment.

Example Transactions – 810 URR Invoices (with and without APP Credit)

A workpaper showing the two generic examples for the guides was reviewed. The utility specific examples presented during the last meeting should be considered for inclusion in each Utility's EDI Guide.

TOP Supplement 6 – 820 Remittance Advice

A workpaper modifying the existing supplement to change E/M and Marketer to ESCO was presented during the last meeting; no changes were put forth for discussion at this meeting. The BWG Chair again suggested that all parties review to see whether any APP Credit oriented changes would be appropriate.

Another question related to the number of APP Credits that could be provided in an 820 transaction was raised by Craig Wiess (National Grid). The BWG Chair suggested the answer likely depends upon billing model (URR or UBR) and whether or not the ESCO providing the APP Credit was still serving the customers.

The 820 Standards documents will be reviewed offline and if further explanation is required, it will be discussed at an upcoming meeting.

Other Business

Based upon discussion, the Utility Supported EDI Transactions Matrix will be updated to show whether utilities customer block configurations follow the Comprehensive or Dual format. It was noted that the 814HU Business Process Document contained a discussion explaining how enrollment blocks were communicated under either approach.

Establish date/time for next meeting

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The next meeting will be a combined BWG/TWG meeting on Friday 11/6/2015 at 10 AM.

Attendees

Jeff Begley – NOCO Energy Corp.	Barbara White – Ambit Energy
Travis Bickford – Fluent Energy	Mary Do – Latitude Technologies
Thomas Dougherty – Aurea Energy Services	Joe Falcon – Ambit Energy
Barbara Goubeaud – EC Infosystems	Eric Heaton – Con Edison
Gary Lawrence – Energy Services Group	Jennifer Lorenzini – Central Hudson
Jasmine Thom – CES	Mary Agresti – National Grid
Mike Novak – National Fuel Gas	Jean Pauyo – O&R
Kris Redanauer – Direct Energy	Jason Gullo - NFR
Sergio Smilley – National Grid	Alecia Stehnick – Cruis Energy
Dan Stehr – Direct Energy	Ewen Ng – EARTH Corporation
Charlie Trick – NYSEG/RG&E	Jay Zhang – Just Energy
Jennifer Vigil – Champion	Debbie Vincent – UGI Energy Services
Kim Wall – PPL Solutions	Craig Wiess – National Grid
Daniel Stier – Direct Energy	