

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – April 24, 2015

Administration

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The Draft Minutes from the 4/10/2015 EDI Business Working Group (BWG)/Technical Working Group (TWG) meeting were adopted as Final with modification to the attendance list.
- DPS Staff Remarks – None.

Regulatory Update Regarding EDI Matters

The question of whether all the items in the April 7 Report were approved upon filing or just the APP Credits related EDI Standards was posed to DPS staff. Since DPS Retail Access Staff no longer has dedicated counsel, an answer could not be provided but past discussions indicating the Commission's desire to have EDI Standards approved without issuing an Order was acknowledged.

Modifications to PSC EDI Web pages

There were no significant modifications since the last meeting.

May 4 Report Deliverables

- a. Given that Staff has not had a chance to obtain a review from counsel concerning the Phase I testing proposal discussed during the last meeting and the Working Group's plans to develop additional EDI transactions to support the APP Credit process, it appears unlikely the Working Group can meet this deadline. After discussion, there were no objections to proposing July 20, 2015 as the proposed extension date. This additional time will also give the Working group a better handle on developments in the APP collaborative. The BWG Chair will request an extension from the Secretary.
- b. Phase I Testing – No comments from call participants regarding changes to the proposal.
- c. Phase III Testing – DPS staff has asked that in the July report, more explanation about the testing be added.
- d. Reducing Time between EDI Standards filings and Implementation - A proposed regulatory process, similar to that used to approve changes to utility Gas Transportation Operating Procedures, was discussed. For example, proposed EDI Standards filed by the EDI Working Group would be adopted within 30 days of filing absent objection filed with the Secretary. Since the default assumption would be that proposed EDI Standards

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would be approved, testing and implementation could begin sooner. Currently most utilities wait until the Commission issues an Order to start development of systems changes to support new transactions prior to testing and implementation; in theory this process could begin 30 days after the Working Group filing.

e. New Transactions related to APP Credits

- i. Provision of Full Service Billing Amounts – A workpaper was reviewed asking whether the 867HU be modified to provided or whether another transaction should be created to provide Utility Full Service Amounts for the APP Credit calculation. As with usage, up to 24 months of full service billing amounts could be provided which would cover the potential for a lag between the end of ESCO service and provision of the APP Credit. The TWG Chair thought that since no other states has a similar credit process, that a new transaction was more appropriate.

Use of an 814HU request, submitted by the ESCO with APP Customer account numbers was discussed. There was discussion whether full service billing amounts should be controlled by usage blocks or account blocks; responses would be provided if there is no block on the account. An exception to the block might be justified for the months the ESCO served the customer.

An additional question raised was whether provision of historical Utility Full Service Amounts should be limited to customers who would receive APP Credits or could be provided for any customer.

The TWG Chair asked that utilities provide information describing their online historical bill calculators to help determine how the new transaction should be designed.

- ii. Reducing APP Credit Transaction incidences – During past meetings, the inability of some utility billing systems to process APP Credits with monthly usage was identified. A workpaper proposing that a modified 248 Application Advice transaction to inform ESCO that the APP Credit has been provided on a customer bill could be a potential solution to the lack of monthly usage. The modified 248 would provide notification to the ESCO of the amount or POR payment reduction resulting from the APP Credits.

Establish date/time for next meeting

The next meeting will be a combined BWG/TWG meeting on Friday 5/8/2015 at 10 AM.

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Attendees

Mary Agresti – National Grid	Jeff Begley – NOCO
Mary Do – Latitude Technologies	Thomas Dougherty – Aurea
Joe Falcon – Ambit	Vicky Gillmore – Energy Services Group
Barbara Goubeaud – EC Infosystems	Jason Gullo – National Fuel Resources
Eric Heaton – Con Edison	John Holtz – NRG
Vince LaFratta – Converged Energy	Gary Lawrence – Energy Services Group
Janet Manfredi – Central Hudson	Kristin McFarland – IGS Energy
Mike Novak – National Fuel Gas	Meela Neebar – EC Infosystems
Jean Pauyo – Orange & Rockland	Debbie Rabago – Ambit
Kris Rednauer – Direct Energy	Patricia Reno – TransCanada
Sergio Smilley – National Grid	Robin Taylor – DPS Staff
Jay Tompkins – Central Hudson	Charlie Trick – NYSEG/RG&E
Marie Vajda – NYSEG/RG&E	Jennifer Vigil – Champion
Craig Wiess – National Grid	Amie Williams – Agway
Jay Zhang – Just Energy	Brandon Blandford – Direct Energy
Julie Goodchild – Direct Energy	