

**Case No. 12-M-0476 et al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Final Minutes – February 3, 2017**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- DPS Staff Remarks: None.
- The Draft Minutes for the 1/20/2017 meeting were adopted as final with one non-substantive modification to correct a typographical error.

**Regulatory Update**

The BWG Chair noted that the Commission had extended the implementation date of the Prohibition Order to May 26, 2017. With that new date, an extension to the APP Credit testing deadline will be requested, likely to June 1, 2017. Staff wants to have APP Credit functionality on utility issued ESCO bills in place when the Prohibition Order is implemented. As discussed before (and reflected in the EDI Standards) the cases where an ESCO will be permitted to provide a credit to the customer are very limited, e.g. when a customer no longer receives a bill from the utility because they have moved and the account is closed.

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

**a. Current EDI Standards Matrix**

The changes from the last meeting were reviewed, including addition of a line item to reflect utility implementation of 867HU REF~BF changes. There were no other changes from utilities. Barbara Goubeaud (EC Infosystems) suggested that matrix be modified to track when utilities are ready to test receipt of 814C AMT7 code for EPA Credits and when they have implemented.

**b. Prohibition Order Matrix**

The matrix was updated to reflect the implementation extension to May 26, 2017. More substantive review will occur as that date approaches.

**867 IU/HIU Update**

The BWG Chair noted the available workpapers and that the TWG Chair provided comments after the workpapers were created which Eric Heaton (ConEd) will address as part of the discussion. Updated workpapers will be posted as soon as they are available and circulated to the small 867IU/HIU group via email. With respect to 814E REF\*IU workpaper, Eric Heaton noted that the TWG Chair's modifications to the REF02 codes were acceptable.

Moving on the 814HU LIN05 workpaper, an additional change proposed based upon whether ConEd would always provide HIU at an account level or meter level wasn't necessary because it would be accommodated via the REF~IU segment in the 814HU.

In response to a question from ConEd, Dan Stier (Direct Energy) said that they would prefer hourly intervals for gas.

There was some discussion whether it was better to reject a request for meter detail data if it were not available or to send summary data and indicate that detail data is not available. Dan Stier suggested that it would be preferable to send account detail in response to a meter detail request if the meter detail was not available. He suggested a note to explain the default response would be appropriate.

The BWG Chair suggested that rather than relying upon Utility Guides for notes specific to one utility, since ConEd is first to provide interval usage via EDI in New York they have the latitude to put their notes in the guide without specifically referencing their company name. When other utilities implement, the working group can revisit the notes and modify as necessary to defer to utility guides.

The BWG Chair suggested another single topic meeting (for 2/10/2017) – there was no objection.

### **Proposed Elimination of Interim Bill references from 810UBR and 867MU**

Since the last meeting, it was determined that since ConEd issued Utility Rate Ready (URR) bills, the issue of whether segments to support interim billing should be in the 867 IU was moot. Should a utility that issue Utility Bill Ready (UBR) bills need to support interim bills for interval accounts, this decision can be revisited. In any event, the TWG Chair's proposal to remove these segments from the 810UBR and 867MU IGs can proceed because NYSEG/RG&E and Grid have verified they do not use the segments.

### **CCA EDI Modification**

Sergio Smiley reviewed a workpaper proposing a new Public Aggregator Segment for the 814E that would be necessary for systems reasons in their NIMO and KED-LI territories (but not KED-NY) to provide data when ESCOs enrolled customers for a municipality's CCA program. The BWG Chair noted the segment would be optional and was based upon Grid's experience with CCAs in other states. Some but not all other utilities, depending upon how CCAs are structured in their back-office systems, might also utilize the new segment but it was too early in the CCA design process to determine at this point. Grid will present a more fully developed workpaper at the next full working group meeting.

### **867 HU – REF~BF Proposal**

The BWG Chair was unable to prepare updates to Draft IGs in time for the meeting; they should be ready for the next full working group meeting.

### **Communication to pending ESCO when enrollment is cancelled**

The BWG Chair was unable to prepare a workpaper containing modifications to Draft IGs based in time for this meeting. The workpaper should be ready for the next full working group meeting.

### **Seasonal Account Procedures**

Kris Redanauer (Direct Energy) noted that once discussions with one utility had finished, they would be able to determine if any EDI changes were necessary.

### **Proposed Change Control Process**

The BWG Chair said that he would be working with Staff to set up a Change Control web page accessible from the EDI Working Group web page. Whether the request form is a fillable PDF or a static PDF (where requestors would fill out the form manually), the form will be posted to the Change Control

web page and assigned a request number. Both activities pursuant to Orders and requests from submitting parties will be tracked through the date they are reported to the Commission. Implementation will continue to be tracked through the matrices.

**Other Business**

Mike Novak (National Fuel) announced that National Fuel may propose changes to the 814D to permit ESCOs that utilize ESCO Consolidated Billing (ECB) to inform the utility when they a dropping an APP customer as required by the Prohibition Order.

**Establish Date/Time for Next Meeting**

A single topic meeting regarding 867IU/HIU development will take place on Friday 2/10/2017 at 10 AM. The next meeting combined BWG/TWG meeting on Friday 2/17/2017 at 10 AM.

**Attendees**

Barbara White – Ambit	Samantha Curry – Starion Energy, Inc
Mary Agresti – National Grid	Laura Getz – DPS Staff
Jeff Begley – NOCO Energy	Elois Anderson – National Grid
Barbara Goubeaud – EC Infosystems	Rachel Frye – Direct Energy
Charlie Trick – NYSEG/RG&E	Cindy Tomeny – National Grid
Tracie Gaetano – IGS	Mike Pawlowski – National Grid
Dan Stier – Direct Energy	Mike Novak – National Fuel Gas Dist.
Deborah Croce – EC Infosystems	Jean Pauyo – O&R
Elorita Martinez – National Grid	Mary Do – Latitude
Angela Schorr – Direct Energy	Jasmine Thom- CES
Debbie Rabago – Ambit	Sergio Smilley – National Grid
Gary Lawrence – Energy Services Group	Tom Dougherty – Marketwise
Janet Manfredi – Central Hudson	John Cooney – National Grid
Travis Bickford – Fluent Energy	Adam Powers – CleanChoice Energy
Kris Redanauer – Direct Energy	Eric Heaton – Con Edison