

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

**Administration**

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

**Regulatory Update**

There hasn't been any regulatory action that would directly impact EDI since the last working group meeting.

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

- a. Current EDI Standards Matrix

The BWG Chair reviewed changes since the last meeting. Both ConEd and O&R changed their date for implementation of the 814C AMT\*7 segment to 4/2/2018. No other utility updates were provided.

**March 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. There were no updates since the last meeting but updates will be prepared for the next meeting. The BWG Chair reminded working group participants to review draft documents posted on the Report Preparation web page. While preparations for the March 30, 2018 EDI Report date are still on schedule, the report could slip to April 30, 2018 if modifications currently under discussion become delayed.

**DERS related EDI changes**

The BWG Chair has not received any questions/comments on the proposed modifications to the TOPs, Supplements and EDI Standards (814HU, 867HU and 867HIU IGs) documents currently available on the EDI Report Preparation web page. The Gas Pool ID segment concerning 867 HU and 867 HIU responses raised during the last working group meeting is no longer an issue. Modifications to Business Process documents and Data Dictionaries, as appropriate, will be prepared for the next working group meeting.

**NFG ECB Prohibition Order Requirements**

The BWG Chair has not received any questions/comments on the proposed modifications to the EDI Standards (814C, 814E and 810SR IGs) documents currently available on the EDI Report Preparation web page. Modifications to Business Process documents and Data Dictionaries, as appropriate, will be prepared for the next working group meeting.

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

The utilities had a conference call with Staff last week to discuss processing of ESCO credits for APP customers and non-APP customers. Guidance was provided expressing a desire to have the AMT\*7 segment used for guaranteed savings program credit regardless of whether it was for an APP customer or otherwise, i.e. a contractual matter between the ESCO and the non-APP customer or if price guarantee requirements are extended beyond what is currently ordered. Staff supported the concept raised during the last working group meeting of a new optional segment for generic ESCO credits.

The BWG Chair presented an updated workpaper which reflecting the guidance from Staff. The AMT\*7 segment was modified to reflect Guaranteed Savings Program (GSP) credits in place of EPA credits and creation of a new AMT\*UJ segment for generic ESCO credits. Sergio Smilley (National Grid) and Barbara Goubeaud (ECI) suggested further edits to gray box notes to reflect the acronym GSP in place of EPA as well as a note to indicate the history of the AMT\*7 segment for APP and EPA credits.

Craig Weiss (National Grid) suggested that generalizing the GSP to cover both APP and non-APP customers could result in utilities being unable to distinguish between the two customer classes; potentially a problem for responding to Staff data requests. The BWG Chair responded that Staff was aware that this might occur but had some suggestions on how utilities might be able to preserve the distinction. Barbara White (Ambit) posited that reporting on GSP credits was really an ESCO obligation. The BWG Chair agreed but suggested that Staff might sometimes ask utilities for information as a means of confirming or auditing an ESCO response.

Julie Griffiths (National Grid) questioned whether Staff wanted to limit the 503 transaction to APP customers, at least initially. The BWG Chair wasn't sure and since the 503 was designed to provide responses more broadly (at the utility's option), further clarification from Staff would be sought.

The TWG Chair observed that corresponding modifications to Utility Bill Ready (UBR) EDI transactions were not necessary if the utilities supporting UBR processed generic credits using ADJ002 codes on the 810UBR transaction. Gary Lawrence (ESG) confirmed that National Grid processed the ADJ002. Presuming that NYSEG/RG&E similarly processed the ADJ002 code, the workpaper for the next meeting would focus on the 810 and 820 transactions in the context of the Utility Rate Ready model.

### **Other Business**

Sergio Smilley asked about the status of DERS who were not required to register with the Commission to receive consumption history. The BWG Chair noted that Utilities have been assigned the task of developing an application template but this effort was behind schedule. For those DERS required to register, i.e. active community distributed generation (CDG) and onsite mass market distributed generation (DG) providers, for an extension of time to 4/2/18 to file a completed registration form has been filed. Smilley also asked about the status of incorporating DERS into the business process beyond historic usage, e.g. for enrollment or billing. The BWG Chair said that he had no update and suggested that it might be a longer term item.

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

The next meeting combined BWG/TWG meeting is scheduled for Friday 3/2/2018 at 10 AM.

**Attendees**

Jennifer Teel – Big Data Energy	Veronica Munoz – Accenture
Juliana Griffiths – National Grid	Debra Croce – EC Infosystems
Gary Lawrence – Energy Services Group	Jennifer Lorenzini – Central Hudson
Kim Wall – Hansen Technologies	Julie Goodchild – Direct Energy
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.
Eric Heaton – Con Edison	Thomas Dougherty – Marketwise
Pete Foster – NYSEG/RGE	Rebecca Sweeney – DPS Staff
Barbara Goubeaud –EC Infosystems	Travis Bickford – Fluent Energy
Jeff Begley – NOCO	Michelle Ferrara – NYSEG/RGE
Diana Neira – NYSEG/RGE	Nicole Baier – National Fuel Gas Dist.
Emilie Cimoli – Clean Choice Energy	Barbara White – Ambit