

**Case 12-M-0476, et. al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Final Minutes – March 27, 2015**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The Draft Minutes from the 3/20/2015 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 BWG Chair noted that an initial draft of the report was posted on the April 7 EDI Report webpage. A more complete draft will be posted Monday 3/30 and will also be circulated via email. Comments on that draft should be sent to the BWG Chair via email by close of business on Thursday 4/2.

**Modifications to PSC EDI Web pages**

The link to National Fuel's EDI web page from Utility EDI Guides web page is now operational. The initial version of National Fuel's Utility Maintained EDI Guide is a work-in-progress; essentially much of the content is being relocated from the current web page into the guide. Other utilities should send an email containing a link for their web pages/guides to Robin Taylor (Staff) when their guides are ready; NYSEG/RG&E noted they had begun work on their guide. The TWG Chair asked if other utilities had begun work on their guides. The BWG Chair noted that guides should be available before testing in September to help make ESCOs aware of the changes that need to be implemented by November 2<sup>nd</sup>.

**ESCO Assistance Program Participant Credits**

The BWG Chair recapped his discussion with Staff concerning billing window issues and provision of credits when customers no longer receive bills prepared by utilities. Staff understands that there will be certain cases where ESCO will have to issue the credits directly to customers, e.g. if the customer has moved out of a utility's service territory. Staff's preference is to maximize the number of APP Credits provided through utility issued bills. Staff further understands that the EDI Working Group will continue to work on solutions to these issues, which may vary by utility and include non-EDI alternatives, and on development of other transactions related to the APP Credit.

**Review of Updates to EDI Standards Documents**

The EDI Working Group reviewed workpapers prepared by O&R, NYSEG/RG&E & National Fuel the addressed various inconsistencies, errata and/or clarifications impacting the EDI Standards documents for the 814C, 814D and 814E transactions. Additionally, changes to the 814C Business Process document reflecting discussion from the 3/20 EDI Working Group meeting were reviewed.

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The final modified versions of the EDI Standards Documents to be included in the April 7 Report (810SR, 810UBR, 810URR, 814C, 814D, 814E, 814R and 867MU) have been or will be posted to the April 7 Report webpage. The BWG Chair noted that for each transaction, the Index of Changes shows the last meeting for which modified EDI Standards Documents were prepared. Based upon today's discussion a few of the posted documents will be updated once more.

**Establish date/time for next meeting**

The next meeting will be a combined BWG/TWG meeting on Friday 4/10/2015 at 10 AM.

**Attendees**

MaryAnn Allen – Integrys	Zeno Barnum – Hudson Energy
Jeff Begley – NOCO Energy Corp.	Mary Do – Latitude Technologies
Thomas Dougherty – Aurea Energy Svs	Giovanni Formato – Con Ed
Barbara Goubeaud – EC Infosystems	Jason Gullo – National Fuel Resources
Eric Heaton – Con Ed	John Holtz – NRG
Christine Hughey – Constellation	Gary Lawrence – Energy Services Group
Jennifer Lorenzini – Central Hudson	Janet Manfredi – Central Hudson
Kristin McFarland – IGS Energy	Veronica Munoz – Accenture
Rebecca Myers – UGI Energy Services	Mike Novak – National Fuel Gas Distribution
Jean Pauyo – O&R	Debbie Rabago – Ambit
Patricia Reno – Transcanada	Jay Sauta – Agway
Sergio Smilley – National Grid	Denise Shaw – Transcanada
Susan Swiderski – NRG	Robin Taylor – DPS
Kandi Terry – Just Energy	Jay Tompkins – Central Hudson
Charlie Trick – NYSEG/RG&E	Marie Vajda – NYSEG/RG&E
Debbie Vincent – UGI Energy Services	Kim Wall – PPL Solutions