

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – May 8, 2015

Administration

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The Draft Minutes from the 4/24/2015 EDI Business Working Group (BWG)/Technical Working Group (TWG) meeting were adopted as Final without modification.
- DPS Staff Remarks – A notice to be published in the State register beginning the regulatory approval process for the non-APP Credit items in the April 7 EDI Report has been prepared.

Regulatory Update Regarding EDI Matters

- a. A Request to Extend May 4 Deadline was filed on April 30 and granted on May 4. The report will now be due on July 20, 2015.
- b. Commission Approval of non-APP Credit items from April 7 Report – The SAPA was submitted on May 5 and will be published on May 20. The earliest Commission action date is July 4, 2015.
- c. Reducing Time between EDI Standards filings and Implementation
 - Jeremy Euto stated that National Grid would prefer to see expedited procedures not applied to transactions resulting from Case 14-M-0101 and related matters. For EDI standards implementing items from these matters, a full regulatory process and associated timeline was seen as more appropriate.
 - The BWG noted that the proposal has a provision for any party to seek a full review but apparently that provision needs to be more prominent. A workpaper will be posted for next meeting regarding the change.
- d. Extension of APP Credit Implementation Due Date (currently set for 8/5/2015) – The date will need to be extended; optimally testing would be concurrent with the testing for the November 2nd EDI Implementation (September). Since the 2/6/2015 Order specified implementation for August, there will be a need to be a regulatory filing to request a change to the implementation date.

May 4 (July 20) Report Deliverables

- a. Phase I Testing
 - LuAnn Scherer (Staff) has not heard back from Counsel; she will follow up.
 - The BWG Chair noted that he was aware of an ESCO that would be approaching Staff for Phase I testing under the current procedures.
- b. Phase III Testing
 - Since some of the Phase III concepts to be considered are dependent upon the Phase I Testing decision, there was no further discussion.

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- c. New Transactions related to APP Credits
 - i. Provision of Full Service Billing Amounts – A workpaper describing the contents of a proposed 503 EDI Transactions was reviewed.
 - There will be a 503 Request (from the ESCO) and a 503 Response (from the utility).
 - A decision was made to provide monthly detail information rather than a total for a requested period; the 867HU transaction will serve as a model.
 - Data (up to 24 months, if available) will only be provided for months in which the Requesting ESCO provided service.
 - There will be a 503 Request (from the ESCO) and a 503 Response (from the utility).
 - Further discussion will be necessary to determine the level at which amounts would be provided, e.g. supply charges, delivery charges, total billed...
 - For National Grid's Bill Ready system, if an ESCO misses the bill window or has its billing transactions rejected, the ESCO charges will appear in the month during which they successfully submit the transactions. Since APP Credits are based upon total charges over a period (up to 12 months), zero or unusually large ESCO billing amounts should not be an issue for credit calculation.
 - Before the next meeting, bill window processing for NYSEG/RG&E's bill ready system will be reviewed to see if it is consistent with National Grid's system.
 - ii. Reducing APP Credit Transaction incidences – The BWG Chair noted that no one had commented either way since the last meeting on the suitability of using 248 transactions when 867 MUs (monthly usage) were not available (and therefore, no rate ready invoice would be issued).
 - Discussion confirmed that 810 Invoices would be used to confirm processing of APP Credits when invoices when monthly usage was available and an invoice issued.
 - For non-invoice situations, a preference for using 820 transactions was expressed presuming that a code clearly identifying APP credits was provided. The BWG Chair noted that such a proposal had previously been reviewed and rejected.
 - The BWG and TWG Chairs, along with Gary Lawrence and Jean Pauyo, will review the past 820 workpapers before the next meeting and a workpaper will be prepared for discussion.
- d. Updates to Existing Transactions
 - No items were raised for discussion.

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Establish date/time for next meeting

The next meeting will be a combined BWG/TWG meeting on Friday 5/22/2015 at 10 AM.

Attendees

Mary Agresti – National Grid	Zeno Barnum – Hudson Energy
Travis Bickford – Fluent Energy	Brandon Blanford – Direct Energy
Mary Do – Latitude Technologies	Thomas Dougherty – Aurea Energy
Barbara Goubeaud – EC Infosystems	Gary Lawrence – Energy Services Group
Janet Manfredi – Central Hudson	Brian Meredith – IGS Energy
Mike Novak – National Fuel Gas	Jean Pauyo – Orange & Rockland
Debbie Rabago – Ambit Energy	Donna Satcher-Jackson – National Grid
Sergio Smilley – National Grid	Jim Stauble – Accenture
Alecia Stehnick – Crius Energy	Robin Taylor – Dept. Public Service
Jasmine Thom – CES	Jennifer Vigil – Champion Energy
Debbie Vincent – UGI Energy	Kim Wall – PPL Solutions
Jay Zhang – Just Energy	Jason Gullo – National Fuel Resources
Jeremy Euto – National Grid	