

**Case 12-M-0476, et. al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Draft Minutes – October 20, 2014**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The 10/14/2014 Draft Minutes were adopted as Final with a date correction and an addition to the attendee list.
- DPS – no remarks.

**Review of Draft Report**

The first Draft of the October 23 Report to be filed with the Commission was posted to the October 23 Report web page. The EDI Working Group reviewed the draft page by page and made modifications as necessary. Other modifications will be provided off line and a second draft will be posted Tuesday. The draft will also be circulated via email to meeting attendees.

**Technical Working Group Discussion**

Mary Do and Gary Lawrence, lead the technical review of modifications to Implementation Guides & Data Dictionaries, respectively. Mike Novak led the review of the Business Process documents, as applicable. Corrections of errata and/or modifications for consistency were noted and will result in minor modifications to the 867HU and 814C IGs. The BWG Chair noted that if following the meeting other similar changes were identified they should be circulated via email to the working group members that have been modifying the documents. As necessary, other documents will be modified prior to filing.

**EDI Glossary**

No new modifications to EDI Glossary were made.

**Test Plans**

In addition to the three TOP documents identified during the 10/14 meeting as a part of the October 23 Report, three additional documents pertaining to the Single Retailer model will also be included:

- Technical Operating Profile - Supplement 7a
- Technical Operating Profile - Supplement 7b
- Technical Operating Profile - Supplement 7c

As with the first three TOP documents, most of the changes to the SR TOPs were updates to reflect updated terminology from the February 25 Order.

## **Recommended Timeframe for Implementation**

Both utilities and ESCOs will need to make modifications to their business systems to accommodate processing of information contained in the Revised EDI standards. Through discussion, the EDI Working Group developed a two phase implementation process for the Revised EDI Standards. The phases were as follows:

- Phase I: Utilities would be given up to six months following issuance of an Order adopting the Revised EDI Standards to complete their system updates.
- Phase II: Once the system updates are completed, utilities should begin testing with ESCO and/or EDI Service Providers.
  - Testing should be completed within a two-month period.
  - If a utility completes its system updates prior to the end of the six-month period, the time should be added to the two-month testing period.

With approximately 240 ESCOs active within New York State, the coordination of testing dates with each of the utilities may be a daunting task. By initiating testing as soon as system updates are completed, those utilities able to complete their updates prior to the six month deadline can help lessen the likelihood of testing scheduling conflicts for ESCOs and EDI Service Providers. The EDI Working Group recognized that ESCO system updates will proceed at an independent pace which may or may not align with each utility's system update completion date. Further, ESCOs may have to sequence testing with each utility so the proposed two-phase implementation should provide some flexibility to ESCOs and/or EDI Service providers too.

## **Establish date/time for next meeting**

The next meeting will be a combined BWG/TWG meeting on Friday 11/14 at 10 AM. Likely topics will include addressing any follow-up questions from the October 23 Report, Test Plans and changes to the Commission's EDI web site.

## **Attendees**

Jean Pauyo – Orange & Rockland	Suzanne Clark – Liberty Power
Jeff Begley – Fluent Energy	Mary Do – Latitude Technologies
Tom Dougherty – Aurea Energy Services	Brian Merideth – IGS Energy
Mary Ann Allen - Integrys	Gary Lawrence – Energy Services Group
Jennifer Lorenzini – Central Hudson	Mike Novak – National Fuel Gas
Marc Webster – NYSEG/RG&E	Jay Sauta – Agway Energy
Amy Davis – NYSEG/RG&E	Sergio Smilley – National Grid
Giovanni Formato – Con Edison	Janet Manfredi – Central Hudson
Rick Tra – National Grid	Charlie Trick – NYSEG/RG&E
Marie Vajda – NYSEG/RG&E	Debbie Rabago – Ambit Energy
Debbie Vincent – UGI Energy Services	Kerri Kirschbaum – Con Edison
Christine Hughey - Constellation Energy	JoAnne Siebel – Orange & Rockland