

**Case 12-M-0476, et. al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Final Minutes – December 4, 2015**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The Draft Minutes from the 11/20/2015 EDI Business Working Group (BWG)/Technical Working Group (TWG) meeting were adopted as final without any modifications.
- DPS Staff Remarks
  - The EDI Order regarding the 7/24/2015 EDI Report, approved by the Commission on 11/19/2015, will be made public next week.

**Regulatory Update**

- An APP Credit Testing Extension Request was filed on 11/23/2015 and the granted the next day. The testing deadline is now 4/1/2016. The BWG Chair noted that that the scope of testing now should include items approved by the 11/19/2015 Order but implementation is still contingent upon an anticipated Order on Low Income Matters (including APP Credits).
- The Commission is now seeking comments on the Collaborative Report submitted 11/5/2015 for this matter.

**EDI Order (if issued)**

The BWG Chair will circulate the Order to the Working Group via email when it becomes public. Working Group members were encouraged to re-read the 7/24/2015 EDI Report to review the modifications to the EDI Standards and expedited approval processes.

- Phase I process will be handed over to the utilities.
- A workpaper showing a new Phase I Testing Application form was presented. More detailed discussion will take place at the next meeting but preliminarily, basic instructions (for new ESCOs) will be added to the form.
- Language in the applicable TOP Supplements will be modified to conform to the new Phase I testing rules.
- Robin Taylor will be asking utilities for EDI contacts to provide to ESCOs as a part of the application process.

**Review of Implementation Plans – Discussion on timing, etc**

There was no workpaper available for this meeting but when the order is issued, utilities should review their implementation plans to determine if the status of any items should change. More detailed discussion will take place at the next meeting. January 29, 2016 was set as a tentative date for the next EDI filing.

**EDI Report Preparation Web Page**

EDI Standards documents that will included in the next EDI filing have been posted to the Proposed Changes to EDI Standards Documents – Month Day 2015 Report web page. EDI Working Group members should review the documents and report any items that need to be corrected. The BWG Chair noted a language was added to TOP Supplements 3-6 stating:

“Scalability/Suitability: Utilities may streamline Phase III testing by excluding EDI transactions listed in the EDI Standards Technical Operating Profiles Supplements that are not supported in a

**Case 12-M-0476, et. al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Final Minutes – December 4, 2015**

utility's EDI implementation. The test scenarios provided herein should not be interpreted as creating a testing requirement in cases where the utility does not support a transaction identified in a scenario. The utility and ESCO and/or its EDI Service Provider should review tests completed with other New York utilities to determine if any testing gaps exist and if so, accordingly adjust utility testing as applicable to the ESCO."

The BWG Chair reviewed how the Change Index can be used to reference changes proposed for the EDI Standards documents.

**ICAP Tag Discussion**

A workpaper showing changes to the 814C ICAP DTM Date/Time Reference (Effective Date of Change) Segment was reviewed reflecting modifications to the comment in the gray box as follows:

"When a DTM~007 segment is not sent and the date has not been provided in another DTM segment (DTM~105, DTM~AB2...), it can be presumed that the transaction date is the effective date of the change. In any case, the utility should clarify its use of this segment in its Utility Maintained EDI Guide."

**Other Business**

Gary Lawrence (ESG) will be reviewing the Implementation Guide Change proposed for the next EDI Report to determine if any Data Dictionary updates are needed.

**Establish date/time for next meeting**

The next meeting will be a combined BWG/TWG meeting on Friday 1/8/2016 at 10 AM.

**Attendees**

|                                       |                                       |
|---------------------------------------|---------------------------------------|
| Jeff Begley – NOCO                    | Travis Bickford – Fluent              |
| Mary Do – Latitude Technologies       | Thomas Dougherty – Marketwise         |
| Ewen Ng - EARTH Corporation           | Barbara Goubeaud – EC Infosystems     |
| Jason Gullo – National Fuel Resources | Gary Lawrence – Energy Services Group |
| Jennifer Lorenzini – Central Hudson   | Janet Manfredi – Central Hudson       |
| Veronica Munoz – Accenture            | Mike Novak – National Fuel Gas        |
| Jean Pauyo – O&R                      | David Parnell – Direct Energy         |
| Sergio Smilley – National Grid        | Robin Taylor – DPS Staff              |
| Jasmine Thom – CES                    | Charlie Trick – NYSEG/RG&E            |
| Jennifer Vigil – Champion             | Craig Wiess – National Grid           |
| Amie Williams - Agway                 | Colin Tyler - NRG                     |