

**Case No. 12-M-0476 et al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Final Minutes – February 17, 2017**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- DPS Staff Remarks: Rebecca Sweeney (DPS Staff) will be taking over for Laura Getz.
- The Draft Minutes for the 2/3/2017 meeting were adopted as final without modification.

**Regulatory Update**

The BWG Chair noted that a request to extend the APP Credit testing deadline to June 1, 2017 had been filed with the Commission Secretary.

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

**a. Current EDI Standards Matrix**

Since the last meeting, the matrix was updated to track when utilities are ready to test and implement receipt of 814C AMT7 code for EPA Credits and the 503 transaction. There were no other changes from utilities present. The BWG Chair noted that for the 3/3/2017 meeting an update to the matrix reflecting an extension of the implementation date to 6/1/2017 was anticipated.

**b. Prohibition Order Matrix**

The matrix was updated to reflect the implementation extension to May 26, 2017. Sergio Smilley (National Grid) questioned whether the pending court proceeding could further delay implementation. The BWG Chair suggested that was up to the Court and too early to speculate. In any event, as the May 26, 2017 date approaches, if another delay is needed another extension request could be filed.

**867 IU/HIU Update**

The BWG Chair noted that several work papers had been posted for this meeting reflecting changes from end of last meeting. Additionally, Con Edison had offline discussion with interested parties over past two weeks and will provide an update/answer questions.

- Workpaper - 867IU-HIU Development - 814C Interval Usage Option & Workpaper - 867IU-HIU Development - 814E Interval Usage Option

The BWG noted which changes (codes, notes, etc.) had been made since the last meeting. Additionally, the base documents for the workpapers had been updated to reflect the last version of the standards to avoid giving the impression that more recent changes were being eliminated. Eric Heaton (Con Edison) noted there were no other material changes.

- Workpaper - 867IU-HIU Development - 814HU LIN05 Modifications

The ESP abbreviation will be updated to ESCO. An HG Code will be added for meter detail level interval data; HI is for interval level data at the account level.

With respect to the 867IU IG, no workpaper was provided but it was well along. Additional gray box notes will be added to the 867IU IG. There is no 867HIU IG yet; much of what is built for the 867IU will end up in the 867HIU so it make sense to get the 867IU developed first.

The BWG Chair noted that he was confident that the March 31, 2017 EDI Report to be filed would contain a completed IG and data dictionary but that a supplemental filing might be necessary for the Business Process document.

Eric Heaton suggested another single topic meeting (for 2/24/2017) – there was no objection.

### **CCA EDI Modification**

An updated workpaper that included a comparable Public Aggregator Segment from the Ohio EDI guides was reviewed. Sergio Smilley (National Grid) also discussion how they implemented the segment for CCAs in Massachusetts. Based upon discussion, additional updates will be provided in a workpaper at the next full working group meeting.

### **867 HU – REF~BF Proposal**

The BWG Chair was unable to prepare updates to Draft IGs in time for the meeting; they should be ready for the next full working group meeting.

### **Communication to pending ESCO when enrollment is cancelled**

The BWG Chair was unable to prepare a workpaper containing modifications to Draft IGs based in time for this meeting. The workpaper should be ready for the next full working group meeting.

### **Seasonal Account Procedures**

Kris Redanauer (Direct Energy) said that the analysis of the each utility's practices was done. For now, Direct Energy will be working with one utility to determine if additional to suppliers of drop dates for seasonal customers could be provided

### **Proposed Change Control Process**

The BWG Chair said that he did not get a change to contact Staff to set up a Change Control web page accessible from the EDI Working Group web page.

### **Other Business**

The BWG Chair reminded those present to review the refreshed EDI working group roster that has been posted and submit further changes, if necessary.

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

A single topic meeting regarding 867IU/HIU development will take place on Friday 2/24/2017 at 10 AM. The next meeting combined BWG/TWG meeting on Friday 3/3/2017 at 10 AM.

**Attendees**

Jodi Larison – UGI Energy Services	Samantha Curry – Starion Energy, Inc
Mary Agresti – National Grid	Laura Getz – DPS Staff
Jeff Begley – NOCO Energy	Elois Anderson – National Grid
Barbara Goubeaud – EC Infosystems	Marie Vajda – NYSEG/RG&E
Kim Wall – Hansen Technologies	Elizabeth Ciborowski – NYSEG/RG&E
Tracie Gaetano – IGS	Jennifer Lorenzini – Central Hudson
Julie Goodchild – Direct Energy	Mike Novak – National Fuel Gas Dist.
Jennifer Vigil – Champion Energy Services	Ana Ham – Con Edison
Amie Delooza – Agway	Mary Do – Latitude
Angela Schorr – Direct Energy	Veronica Munoz – Accenture
Debbie Rabago – Ambit	Sergio Smilley – National Grid
Gary Lawrence – Energy Services Group	Tom Dougherty – Marketwise
Janet Manfredi – Central Hudson	Rebecca Sweeney – DPS Staff
Travis Bickford – Fluent Energy	Adam Powers – CleanChoice Energy
Kris Redanauer – Direct Energy	Eric Heaton – Con Edison
Dan Stier – Direct Energy	