

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – August 22, 2014

Administration

- Review/Modify Agenda: The Draft Agenda was adopted.
- The 8/8/2014 Draft Minutes were adopted without modification as Final.
- DPS – no remarks.

EDI Modification Priority Planning

The updated spreadsheet was reviewed.

Update on EDI Outreach Communication to REMS forum

The BWG Chair announced that a letter providing a progress report and a discussion of the anticipated contents of the October EDI Report filing had been circulated via the REMS email list. The email was issued later than expected so the deadline to provide informal comments was extended to September 4, 2014. As responses are received, the BWG will review them during meetings in August and early September in preparation of the October EDI Report.

Technical Working Group Discussion

The BWG Chair explained that the posted redline documents were developed by comparing the changes under discussion within the working group to the current standards documents. Utility specific notes were modified by replacing the names of utilities with a reference to utility optionality or elections. The utilities referenced within the notes will identify their elections within their Utility Maintained EDI Guides which are to be used by ESCOs and EDI Service providers in conjunction with the New York EDI Standards documents. The BWG Chair noted that the posted Utility Maintained Implementation Guides/Documents workpaper was updated to contain the changes in the draft IGs.

The TWG Chair then proceeded to review the Draft Changes to the IGs. All parties were asked to look for inconsistencies such as cases where multiple terms with the same meaning were used, e.g. use and usage, so that they can be made consistent. Examples at the end of each of the IGs are to be updated to reflect new features, and otherwise be refreshed so that they are current. Finally, utilities were asked to look through the IGs to identify segments that are no longer used and useful. They are to be removed because they are no longer needed.

Workpaper - 867 Historical Usage IG - Draft Changes

- An example showing use of the PTD*FG loop, with and without historical usage data, will be added.

Workpaper - 814 Historical Usage IG - Draft Changes

- There was discussion concerning potential confusion concerning the CAB code; for comprehensive block utilities it meant that everything was blocked, i.e. enrollment and historical usage items were both blocked while for dual block utilities it only referred to enrollment blocks.

- The dual definition is by design; the notes are structured to avoid confusion by explaining the context. Further, this approach provides comprehensive utilities with “no change” implementation.
- Dual block utilities will send both CAB and HUR codes when enrollment and historical usage items are both blocked by the customer.
- The utilities that employ comprehensive block will review the draft language offline and may propose alternative language to alleviate any confusion.

Workpaper - 814 Change IG - Draft Changes

Workpaper - 814 Enrollment IG - Draft Changes

- The TWG noted that some Segment Names in the current draft IGs, e.g. SIC/NAISC, had minor differences but that they would be made consistent throughout all of the IGs in the next set of Drafts.

Finally, it was noted that many segments throughout the Draft IGs, Syntax Notes and Semantic Notes appeared to not be applicable the indicated segments. This approach appears to result from a “cut and paste” error several versions ago. It was noted that PJM’s EDI guides leave the Syntax Notes and Semantic Notes blank unless they apply to the indicated segments. A review will take place and unnecessary Syntax Notes and Semantic Notes will be removed for the October EDI Report.

ReCharge NY Indicator

Con Ed reviewed a workpaper showing a web page display of customer billing history that included an indicator identifying whether the customer was participating in the ReCharge NY program. This information is available to ESCOs on a pre-enrollment basis provided that the ESCO has the customer’s account number. A further explanation could be provided in Con Ed’s Utility Maintained EDI Guide.

Task Assignments

The BWG Chair asked for volunteers to begin review of the Data Dictionaries and Business Process Documents to make changes that conformed to the new IGs. These documents, along with revised Test Plans, will be part of the October EDI Report to be filed with the Commission.

Priority I A Discussion

There were no updates since last week’s meeting.

Priority II Discussion

There were no updates since last week’s meeting.

Priority III Discussion

Trading Partner Agreement discussions between NYSERDA and the utilities are underway.

Establish date/time for next meeting

The next meeting will be a combined BWG/TWG meeting on 8/29/14 at 10 A.M. The primary focus will be technical development, as appropriate, for the Phase I items.

Attendees

Zeno Barnum – Hudson Energy	Jeff Begley – Fluent Energy
Mary Do – Latitude Technologies	Tom Dougherty – ISTA
Jennifer Lorenzini – Central Hudson	JoAnne Seibel – Orange & Rockland
Joe Falcon – Ambit Energy	Jean Pauyo – Orange & Rockland
Veronica Munoz – Accenture	Giovanni Formato – Con Edison
Jim Stauble – Accenture	Gary Lawrence – Energy Services Group
Janet Manfredi – Central Hudson	Jay Sauta- Agway Energy Services
Mike Novak – National Fuel Gas	Charlie Trick – NYSEG/RG&E
Rick Tra – National Grid	Debbie Vincent – UGI Energy Services
Kandi Terry – Just Energy	