

**Case No. 12-M-0476 et al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Draft Minutes – September 1, 2017**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted.
- The Draft Minutes from the 8/11/2017 meetings were adopted as final with modification to the attendance list and a correction related to adoption of the minutes from the 7/28/2017 meeting.
- DPS Staff Remarks: None.

**Regulatory Update**

The BWG Chair had no updates concerning the August 9, 2017, the Appellate Division, Third Department, issued a Temporary Restraining Order (“TRO”) and Stay of the Low Income Order enjoining the Commission from implementation of the Low-Income Order.

Should there be any updates (and none were imminently expected), the BWG Chair said they would be circulated via email to the working group.

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

a. Current EDI Standards Matrix

The BWG Chair reviewed updates related to the Low Income Prohibition & TRO. The Service Portability row of the matrix was updated. It was noted that when a Utility had a status of No, it means that EDI is not used; some utilities accomplish service portability through non-EDI means. The status of Con Ed’s interval metering EDI implementation was updated.

b. Prohibition Order Matrix

An updated matrix, based upon discussion at the last working group meeting was discussed. Utilities provided updates on the status of creating updated files and or lists in light of the TRO..

**Next EDI Report Filing**

The BWG Chair reminded the working group that filing of the next EDI report will be delayed by two months to October 31, 2017.

**867HIU/MIU Matters**

- No more errata has been found; the 814C changes for missing codes found during the last meeting are now incorporated into the draft guides.
- There were no specific question for Con Ed. Phase III testing has been completed.
- Con Ed Supplemental Guidelines & Testing have been completed but has not yet been uploaded to their web site. In the interim, it has been sent to ESCOs and EDISPs via email.

## **814D Business Process - Customer Moves/Account Closure**

### **a. 814D IG - A96 Reject Code EDI Modifications**

Gary Lawrence (ESG) discussed a workpaper proposing addition of a new REF~7G rejection code – A96. The deadline for submitting a Contest Period request (CHA) is 3 business days prior to effective date of pending enrollment. If date is missed then this rejection code would be sent.

Jean Pauyo (O&R) asked if the new code would be required. The BWG Chair asked utilities to investigate the difficulty of implementing the code on a mandatory basis.

### **b. 814D Business Process - Customer Moves/Account Closure**

The BWG Chair reviewed a workpaper that was color code to reflect different topics. The first edit proposes that when customer closes its account, if it is disclosed that it is for a move, the utility will inform customer to call its ESCO to inform them of move. The working group supports the proposed revisions and they will be reflected in the draft documents to be filed.

### **c. 814D Business Process - Prohibition on Termination Fees at Account Closure**

In lieu of using an EDI code, the work paper shows revisions similar to those proposed for customer moves. If the person authorized to act on behalf of the customer tells the utility that customer is deceased, the utility will instruct the authorized person to contact the customer's ESCO to inform them of the customer's death. The ESCO will then have notification and presuming verification, the ESCO will not apply termination fee.

It was noted that this approach does not address the circumstances where neither the utility or ESCO is informed of the customer's death. In such circumstances, it is reasonable to presume the ESCO would apply a termination fee, if called for by the contract with the customer.

### **d. 814D IG - Customer Moves/Account Closure**

The workpaper showing changes to codes in IG was reviewed. No utilities close accounts, i.e. support drop requests for customers who are closing their account due to a move; the customer is required to call the utility. Since the DTM~151 is not useful, it can be deleted from the IG. There were no objections to removal of this segment; the revisions proposed in the workpaper will be reflected in the draft documents to be filed.

## **Other Business**

None.

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

The next meeting is a combined BWG/TWG meeting on Friday 9/15/2017 at 10 AM.

**Attendees**

Charlie Trick – NYSEG/RGE	Veronica Munoz – Accenture
Liz Ciborowski - NYSEG/RGE	Jeff Begley – NOCO Energy Corp
Gary Lawrence – Energy Services Group	Elois Anderson – National Grid
Craig Weiss – National Grid	Dan Steir – Direct Energy
Juliana Griffiths – National Grid	Kris Redanauer – Direct Energy
Adam Powers – Clean Choice Energy	Samantha Curry – Starion Energy
John Holtz - NRG	Mike Day – IGS
Jamie Timberlake – Central Hudson	Mary Do – Latitude
Jean Pauyo – O&R	Mike Novak – National Fuel Gas Dist.
Sergio Smilley - National Grid	Amy Delooza – Agway Energy Services
Thomas Dougherty – Marketwise	Rebecca Sweeney – DPS Staff
Travis Bickford – Fluent Energy	Ronald Giron - Con Ed
David Parnell – Direct Energy	Kim Wall – Hansen Technologies
Barbara Goubeaud –EC Infosystems	