

Case No. 12-M-0476 et al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – June 30, 2017

Administration

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The Draft Minutes from the 6/9/2017 meetings were adopted as final without modification.
- DPS Staff Remarks: None.

Regulatory Update

As a consequence of the Low Income Prohibition implementation date being extended to June 26, 2017, an extension was granted from June 1st to July 3rd on testing for 814C APP credit. Per Staff, subsequent extensions will be utility-specific since several utilities will have tested by the July 3 deadline. At this point in time, it appears as if Con Edison and Orange & Rockland will file for waivers. Otherwise, the Commission has not taken any actions that would impact EDI since last meeting.

Gary Lawrence (ESG) asked about the regulatory requirements concerning the 503 transaction and the inter-relationship with the APP Credit transactions visa-vis timing. The BWG Chair explained that the regulatory requirement is for utilities to provide comparisons and the 503 is one means by which that may be done. So far as the BWG Chair understands, there's no requirement for ESCOs (who receive waivers) to calculate credits or for utilities to process such credits until after LI Prohibition implementation. Never the less, if ESCOs (because for example, an ESCO contracts a price guarantee with a customer) and utilities wish to implement prior to LI Prohibition, there's no specific reason the new EDI transactions can't be used.

Sergio Smilley (National Grid) asked whether all mass market customers were subject to price guarantees and EPA Credits. The BWG Chair explained that for now, these requirements would only apply to Low Income customers.

Updates to EDI Implementation Plan(s)

a. Current EDI Standards Matrix

For NYSEG/RG&E, the status for 810UBR/810URR - the CRE030 SAC04 Charge Type was implemented. A row for 503 transaction implementation will be added to the matrix. Otherwise, there were no utility-specific changes.

b. Prohibition Order Matrix

Several utilities explained their manual processes prior to/ in lieu of implementation of the 503 transaction. Otherwise, there were no utility-specific changes.

Next EDI Report Filing

a. 867HIU/MIU Related Updates

- No more errata has been found; the 814C changes for missing codes found during the last meeting are now incorporated into the draft guides.
- Con Ed will prepare more 867 HIU/MIU examples. When they become available, they will be posted as workpapers.
- A workpaper was reviewed - testing dates with ConEd should be set soon. Angel Alvarez (Con Ed) provided more details concerning testing.

Mr. Alvarez engaged in further discussion with several EDI Working Group regarding dates and implementation and samples.

814D – Business Process – Customer Moves/Account Closure

No progress since the last meeting.

814D IG – Prohibition on Termination Fees at Account Closure

A posted workpaper, based upon National Grid's procedures concerning account closure due to customer death, was reviewed. Utilities are generally concerned that due to the ambiguity surrounding the process as well as privacy concerns, the certainty required for an EDI solution is not present. Third party sources of death information might be more reliable than utility records. It may be that implementation of the new law should be between the ESCO and its customers (or the estate of their customer).

This will be discussed further at next meeting. Dan Stier (Direct Energy) asked several questions about utility process. In addition, comparable practices for other states were discussed but the general belief was that only New York has a law prohibiting termination fees at account closure due to customer death. Both utilities and ESCOs were asked to investigate procedures/privacy concerns.

Change Control Process

Kris Redanauer (Direct Energy) discussed a workpaper using the Termination Fee matter to test of the new change control process. The BWG Chair noted that even if no EDI development takes place, that would be a valid result to report on a new change control web page to be populated.

Other Business

The BWG Chair noted that towards the middle of July, the Joint Utilities another Low Income Prohibition Order extension request would likely be filed if no Court action has taken place. Otherwise, there was no new business.

Establish Date/Time for Next Meeting

The next meeting is a combined BWG/TWG meeting on Friday 7/14/2017 at 10 AM.

Attendees

Charlie Trick – NYSEG/RGE	Veronica Munoz – Accenture
Barbara Goubeaud – EC Infosystems	Jeff Begley – NOCO Energy Corp
Deborah Croce – EC Infosystems	Dan Stier – Direct Energy
Craig Weiss – National Grid	Justin Marshall - IGS
Gary Lawrence – Energy Services Group	Kris Redanauer – Direct Energy
Adam Powers – Clean Choice Energy	Rick Malek – National Grid
Kim Wall – Hansen Technologies	Jean Pauyo – O&R
John Cooney – National Grid	Jasmine Thom – CES
Jen Lorenzini – Central Hudson	Mary Do – Latitude
Liz Ciborowski – NYSEG/RGE	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	Angel Alvarez – Con Ed