

**Case 12-M-0476, et. al.**  
**EDI Business Working Group (BWG)**  
**Final Minutes – April 25, 2014**

**Administration**

- Mike Novak briefly summarized the discussion at the April 24, 2014 Commission session regarding an order for rehearing. There were certain provisions from the February 25<sup>th</sup> order that were stayed (third-party verification, low income, and POR).
- The agenda for the April 25, 2014 meeting was not modified.

Draft minutes for the 4/11/14 meeting were reviewed and finalized with just several minor changes to the attendee list. Final minutes will be posted on the web page for the working groups.

**Discussion: Business Requirements for Electric Customer Historic Energy Usage Pattern Transactions**

**1) Hourly Interval Settlements**

At an account level, the settlement indicator will reflect the current information in the utilities system. For all utilities, each account will be classified as Hourly, Class Shape or Mixed (if applicable). It was noted that while hourly information is available for some meters if it is not used for settlement then the EDI Indicator should not be set to Hourly. Mixed refers to cases where there are more than one meter per account and each meter has its own settlement profile. In this latter case, the BWG agrees that the ESCO should be informed whether the meter is settled as Hourly or Class Shape. ESCOs and the utilities with multiple meters per account will work off-line to determine if any unique meter-specific circumstances and whether it is more efficient to communicate meter level settlement status via EDI or through a non-EDI means. Their report to the BWG back at its next meeting will determine whether further development is needed on this issue.

It was noted that as equipment changes take place, meters currently classified as Class Shape could become Hourly. It was unknown whether enrollment change transactions currently communicate these changes. Although settlement-related changes to enrollment transactions were not identified in the Order, parties were told to bring the issue to BWG for consideration if necessary.

**2) Utility Discounts**

This indicator will be limited to non-residential accounts and will be a simple (Yes/No) indicator. ESCOs, upon receipt of 'Yes' will contact both the utilities and customers to learn the details (including conditional provisions). The BWG determined that details were customer-specific and thus not a good fit for EDI. Email, for example, might be appropriate to communicate customer specific details to ESCOs.

### 3) NYPA Incentives

This indicator will be a simple (Yes/No) indicator. ESCOs, upon receipt of 'Yes' will contact both the utilities and customers to learn the details. The BWG determined that details were like customer-specific, e.g. questions concerning the amount of load to be served, and thus not a good fit for EDI. Email, for example, might be appropriate to communicate customer specific details to ESCOs.

### 4) Low Income Enrollment Status

Due to the Order approved at 4/24/2014 PSC Session, there was no significant discussion on this topic. It was noted that Low Income oriented EDI development, to the extent not affected by the 4/24/2014 Order, could still take place within the working groups.

### 5) Reject Reason Codes

No workpapers were presented and it was determined that the Customer Block reject reason code already existed. Some wondered whether the need for additional codes really pertained to enrollment drop transactions. Another attempt to solicit workpapers will be made and if nothing is submitted, the issue will be considered closed with no further development necessary.

### Next Meeting

The next meeting will be scheduled on May 2, 2014 and will likely be a Technical Working Group meeting. The meeting will be scheduled from 1-3 pm.

### Attendees:

Patrice O'Connor—Dept of Public Service Staff	Jason Gullo- National Fuel Resources
Mike Novak- National Fuel	Mary Do – Latitude Technologies
Marc Webster – NYSEG/RG&E	Jay Sauta- Agway Energy Services
Victoria Gilmore – Energy Services Group	Rosemary Garlapow – National Fuel Resources
Kandi Terry – Just Energy	Richard Spilky – Integrys Energy
Charlie Trick – NYSEG/RG&E	Tom Dougherty – I STA
Jennifer Lorenzini – Central Hudson	Diane Beard – National Grid
Janet Manfredi – Central Hudson	Jeff Begley – Fluent Energy
Grisel Garcia – Con Ed	Kitty Wan – Just Energy
Brian Calhoun – Energy Services Group	Debbie Vincent – UGI Energy Services
Christine Hughey - Constellation	JoAnne Seibel – O&R
Giovanni Formato – Con Ed	