

**Case 12-M-0476, et. al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Final Minutes – September 25, 2015**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The Draft Minutes from the 9/11/2015 EDI Business Working Group (BWG)/Technical Working Group (TWG) meeting were adopted without modification.
- DPS Staff Remarks
  - An update was provided on the status of the EDI web pages – they’ve been relocated to the DPS web site from the ASKPSC.com website. The EDI Standards Documents approved in the 9/21/2015 EDI Order are posted on the new web site. The Order has also been posted.

**Regulatory Update**

The BWG Chair explained which transactions were approved in the 9/21/2015 Order and how the implementation dates, which were not specified in the Order, would be worked into the Implementation Matrix discussion over the next couple meetings. It was noted that next Order would address transactions submitted in the July 24, 2015 EDI report.

**Review of 11/2/2015 Implementation Plans – Discussion on timing, etc**

A workpaper showing a matrix was discussed on a line by line basis for each EDI Standards change. The 9/21/2015 Order date was recorded in the matrix. Other modifications, based upon the discussion, will be made in a workpaper prepared for discussion at the next meeting including a restructuring of the expedited test plan rows to accommodate utility provision of test plans to ESCOs at the time of testing via email.

**Utility Supported EDI Transactions**

A workpaper showing a matrix was discussed on a line by line basis for each transaction. During discussion, it was noted that 824AA-NN (inbound) ‘No’ answers should be ‘Yes\*\*’; Utility receives the transaction but does not process.

With respect to 814E transactions, it was noted that some items appear from a business process perspective to be utility initiated processes are actually provided via 814 Enrollment Request Responses, even though there was no request received. Utility call center initiated enrollments, e.g. when a customer requests an ESCO at the time service is initiated, service restorations and seamless moves with some of the processes that could be described as such. Some of the rows in the matrix will be consolidated but the seamless move will still be shown simply because it’s a new transaction.

Modifications, based upon the discussion, will be made in a workpaper prepared for discussion at the next meeting.

**Proposed addition of NYISO zone and/or the gas pooling area to 867HU PTD^FG loop**

A workpaper reflecting relocation of the new segments from the PTD^FG loop to the N1^8R loop was reviewed. The workpaper also contained revisions to the structure of the electric note to reflect optionality and applicability. It was suggested that electric utilities specify which Location Based Marginal Pricing Zones fall within their service territories. The new segments will formally be moved into the IGs as draft changes for the next EDI Report

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**Proposed addition of REF\*BLT segment to the 867MU**

A workpaper was reviewed to remind the Working Group of the original intent of the proposed change. The TWG Chair will review this document and run it through Foresight. Kim Wall and Mary Do would like to see this required in the 867MU; the terminology for mandatory in the NY EDI Guides is “Optional/Must Use”. Utilities will review offline to see if mandatory usage is feasible.

**Proposed update to 814C/814E Gas Capacity Assignment/Obligation Segment**

A workpaper was reviewed; the BWG Chair asked if any utilities still allow ESCOs to request gas capacity. Marc Webster said that NYSEG/RG&E do not use the transaction as an ESCO Request; National Fuel, National Grid and O&R do not either. ConEd will be asked offline and the workpaper will be reviewed again at next meeting.

**Example Transactions – 810 URR Invoices (with and without APP Credit)**

A workpaper prepared in response to Central Hudson’s original example was reviewed. The TWG Chair will provide another document showing examples for other utilities. Central Hudson’s system uses EA for unit of measure instead of DO; the number of examples that will be added to the IG depends upon what other utilities use. An updated document will be reviewed at next meeting.

**Other Business**

None.

**Establish date/time for next meeting**

The next meeting will be a combined BWG/TWG meeting on Friday 10/9/2015 at 10 AM. The BWG Chair noted that if anyone wished to change the day meetings are held from Friday he/she should send him an email.

**Attendees**

Mary Agresti – National Grid	Jeff Begley – NOCO Energy Corp.
Debra Crochie – EC Infosystems	Jess Crommie – Ethical Electric
Mary Do – Latitude Technologies	Thomas Dougherty – Aurea Energy Services
Barbara Goubeaud – EC Infosystems	Jason Gullo – National Fuel Resources
Ewen Ng – EARTH Corporation	Gary Lawrence – Energy Services Group
Jennifer Lorenzini – Central Hudson	Janet Manfredi – Central Hudson
Veronica Munoz – Accenture	Mike Novak – National Fuel Gas
Jean Pauyo – O&R	Debbie Rabago – Ambit Energy
Kris Redanauer – Direct Energy	JoAnne Seibel – O&R
Sergio Smilley – National Grid	Alecia Stehnick – Crius Energy
Robin Taylor – DPS Staff	Jasmine Thom – CES
Marie Vajda – NYSEG/RG&E	Jennifer Vigil – Champion Energy Services
Debbie Vincent – UGI Energy Services	Kim Wall – PPL Solutions
Marc Webster – NYSEG/RG&E	Craig Wiess – National Grid
Jay Zhang – Just Energy	