

BWG Workpaper – NYSERDA Historic Usage Request – 6/27/2014

From: LuAnn Scherer/OCP/NYSDPS
To: Utilities
Date: 06/19/2014 04:52 PM
Subject: EDI and NYSERDA

We received an inquiry from the Governor's Office about the provision of data to NYSERDA via EDI. Recall we spoke about this a year or so ago. The specific data points they are looking for follows - they will only request data with customer authorization.

ESCO name and ID
Utility name and ID
Customer name
Service address – street, city, state, postal code
Customer utility account number
Commodity type – electric or natural gas
Rate Class
Number of months in the data set (up to 24 months)
Measurements

- o Actual or Estimated
- o Quantity
- o Unit

Read start and end dates
Natural gas load profile if requested and available

During a conference call on 6/23/2014 between DPS Staff and Utilities, the following points were raised:

- 1) If from an EDI perspective NYSERDA appeared like an ESCO, it might be possible to have NYSERDA submit requests for Historical Usage as ESCOs can currently do pre-enrollment.
 - a. NYSERDA would have to enter into Trading Partner Agreements with Utilities.
 - b. While NYSERDA would look like an ESCO, it would have to be restricted from many ESCO functions, e.g. enrollment.
 - c. Utilities would have to be able to presume that NYSERDA had permission to access customer data.
 - 2) Customer Blocks would impact NYSERDA's ability to access usage data.
 - 3) If NYSERDA could use an existing transaction, access to customer usage information could occur more quickly than if a special transaction was necessary.
 - a. If data is present in an existing transaction to which NYSERDA should not have access, it would have to be addressed in some fashion.
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From: LuAnn.Scherer@dps.ny.gov
To: Utilities
Sent: Wednesday, June 25, 2014 11:33 AM
Subject: Re: EDI and NYSERDA

As a follow up to our discussion on the above referenced issue, our attorney's reviewed and determined that NYSERDA can use EDI with the utilities without being "deemed eligible" as an ESCO. We will be providing a letter to you when Phase 1 testing is complete, similar to the letter you receive after an ESCO tests. I am sending the EDI application to NYSERDA today so if you have questions/concerns please let me know ASAP.