

NY EDI Working Groups - Workpaper
Order CASE 12-M-0476 - Proceeding on Motion of the Commission to Assess
Certain Aspects of the Residential and Small
Non-residential Retail Energy Markets in New York State.

	Requirement	Milestones	Project Plan					
		Determine EDI Transaction	Notes / Comments / Follow Up's	Next Action	Status	Responsible Party	Start	Finish
Priority I	Enrollment Rejection Codes: When a utility rejects an EDI enrollment, the utility provides a reason code.	814 HU OR 867 HU [PTD*FG]	Enrollment rejection codes are already provided in an 814 HU response.	None	Open			
	ICAP Tag: A specific prospective customer's Installed Capacity (ICAP) tag, which indicates the customer's peak electricity demand.	867 HU [PTD*FG] OR 503 X (new trans)	Will have to consider adding to the 814 Change transaction.		Open			
	Meter Numbers: Customer's number of meters and meter numbers.	867 HU [existing] OR 867 HU [PTD*FG]	This data is already required and exists in the 867 HU.	Verify if this field is required or optional.	Open			
	Number of Meters: Customer's number of meters and meter numbers.	867 HU [existing] OR 867 HU [PTD*FG]	This data is already required and exists in the 867 HU.	Verify if this field is required or optional.	Open			
	Account Settlement Indicator: Whether the customer's account is settled with the ISO utilizing an actual 'hourly' or a 'class shape' methodology.	867 HU [PTD*FG] OR 503 X (new trans) OR 814 HU Response	If this field is provided in the 814 HU response, manual responses will not be required when an 867 HU request is rejected for "no usage".	Determine which transaction will be used.	Open			
	NYPA / Recharge NY Indicator: Whether the customer receives any special incentives from the New York Power Authority.	814 HU Response OR 867 HU [PTD*FG] OR Utility Website	Determine if this data can be provided outside of EDI since we have determined that there is a list that is made available to ESCOs.	Determine which transaction will be used.	Open			
	Utility Discount Indicator: Whether the customer receives any special delivery or commodity "first through the meter" incentives.	814 HU Response OR 867 HU [PTD*FG] OR 503 X (new trans)	Does it apply to discounts on delivery or commodity. Is it assumed that it is applicable to non-residential customers only.	Understand the specifics of this indicator. The discount programs need to be defined to understand how to provide this information.	Open			

NY EDI Working Groups - Workpaper
Order CASE 12-M-0476 - Proceeding on Motion of the Commission to Assess
Certain Aspects of the Residential and Small
Non-residential Retail Energy Markets in New York State.

	Requirement	Milestones	Project Plan					
		Determine EDI Transaction	Notes / Comments / Follow Up's	Next Action	Status	Responsible Party	Start	Finish
	Industrial Classification Code: The customer's Standard Industrial Classification (SIC) code.	814 HU Response OR 867 HU [PTD*FG] OR 503 X (new trans)		Determine which transaction will be used.	Open			
	Tax Exempt: Whether the utility identifies the customer as tax exempt.	814 HU Response OR 867 HU [PTD*FG] OR 503 X (new trans)	Will have to consider adding to the 814 Change transaction.	Determine which transaction will be used.	Open			
	Customer Supply Status: Whether the customer is served by utility or another ESCO.	814 HU Response OR 867 HU [PTD*FG] OR 503 X (new trans)		Determine which transaction will be used.	Open			
Priority I a	Energy-related value-added service indicator: The ESCO to provide information identifying whether the customer is purchasing an energy-related value-added service and the nature of that service.		Energy related value added services needs to be defined. More discussion is required.		Pending			
	Low Income Status: Provide a field for information on the customer's low income program enrollment status.		Customer privacy policies need to be developed. More discussion is required.		Pending			
	ESCO Credit: Provide any required refund as a credit on the customer's bill.		EDI Optional	Need to understand how other Rate Ready utilities are going to plan for this.	Pending			

NY EDI Working Groups - Workpaper
Order CASE 12-M-0476 - Proceeding on Motion of the Commission to Assess
Certain Aspects of the Residential and Small
Non-residential Retail Energy Markets in New York State.

	Requirement	Milestones	Project Plan					
		Determine EDI Transaction	Notes / Comments / Follow Up's	Next Action	Status	Responsible Party	Start	Finish
Priority II	Full Service Bill Comparison:		EDI Optional	Meet with ESCOs to determine how this will be used.	Pending			
	ESCO must be able to compare actual customer bills to what the customer would have been billed at the utility's rates and, on at least an annual basis.		The Utilities need to understand how the ESCOs will use this information and how often they will require it.					
Priority III	NYSERDA	867 HU	Utilities would like to receive an official document. An official PSC letter or Order addressing what NYSERDA.		N/A			
	Inquiry from the Governor's Office about the provision of data to NYSERDA via EDI.							
	Net Metering		Minimally, would addition of a Net Metering Indicator be helpful?		N/A			
	EDI modifications T.B.D.							