

**Case No. 12-M-0476 et al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Draft Minutes – January 6, 2017**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The Draft Minutes for the 12/6/2016 meeting were adopted as pending a modification to the attendance list.
- DPS Staff Remarks: None.

**Regulatory Update**

The BWG Chair noted that an extension to March 1, 2017 for testing of APP/EPA Pricing Credits was granted. Additionally, a review of the Prohibition Order issued on 12/16/2016 was conducted. An ESCO waiver process for serving APP customers was noted because of the potential impact upon the utilization of various EDI transactions, e.g. the 503 transaction. Questions/Issues included:

- Eric Heaton (Con Ed) asked how ESCOs/Utilities will be notified that particular ESCOs would be notified that they had approval to serve residential APP customers.
- Kandi Terry (Just Energy) asked if the Commission expect savings every month for APP customers over a 12 month period (or the end month if service was for a period less than 12 months).
- With regard to enrollment blocks, do utilities have the ability to distinguish between ESCOs that are approved to supply APP Customers vs. those that do not have approval?
- Will utilities identify which customers no longer eligible for ESCO service? If so, how?
- Can ESCOs determine if a block has been placed on the account before there is an attempt to enroll the customer?
- Kandi Terry asked if ESCOs with approval to serve APP Customers could move customers to compliant price guarantee products without the customer's consent.
- Anton Petrosyuk (Kiwi Energy) asked if new EDI codes would be established to identify which customers enrollments were blocked due to APP Status?
- Will ESCOs be able to differentiate between customer-initiated blocks and Prohibition Order APP blocks?
- Will utilities provide ineligible customer lists as they did before? If so, will the types of customers included in the file be different than what was provided for the Moratorium Order?
- Dan Stier (Direct Energy) asked how lists would be provided and how often will lists be updated.
- Kandi Terry asked if updated files will include only the changes to the list or would be comprehensive, i.e. a list of all ineligible customers until they are dropped.

The BWG Chair reviewed a Prohibition Order matrix patterned after the Moratorium Order matrix was reviewed. The content was preliminary and utilities provided updates where available. Several utilities had not had a chance to fully review the Prohibition Order so a more thorough update is expected for the next meeting.

**Review of Implementation Plans for Current EDI Standards**

A matrix containing updates from the last meeting was reviewed. No further updates were made.

## **Seasonal Account Procedures**

Kris Redanauer (Direct Energy) may have some proposed changes for the next working group meeting.

## **Proposed Change Control Process**

The BWG Chair reviewed a workpaper that included an updated request change form. DPS Staff has not made a decision yet on whether a fillable PDF will be permitted on the web page that will be set up for the change control process. It might be worthwhile to set up a DPS email account to accept request change forms.

## **EDI Test Plan Documents**

There have been no changes to the test plan documents since the last meeting. The issue of new EDI Service Providers qualification will be deferred until after the March 31 filing.

## **867 HU – REF~BF Proposal**

A workpaper showing edits provided by the TWG Chair to the REF Reference Identification (Bill Cycle Code) segment in the 867 HU IG was reviewed. The relationship between whether this information was available pre-enrollment (typically through a secure web site) and the conditionality of the segment was reviewed.

## **867 IU/HIU Update**

Ana Ham (Con Edison) and Eric Heaton answered questions concerning an 867IU - HIU Development Workpaper and a Draft 867IU Implementation Guide that were circulated via email prior to the meeting. The BWG Chair noted that a new segment, REF~IU is being used where REF~17 had been proposed during the last meeting. Gary Lawrence (ESG) contributed to development of the new IGs and described how the 867IU was developed using the 867MU as a template.

Gary Lawrence noted that the interim billing loop in the 867MU was removed from the 867IU but noted that it could be added back in if needed. Eric Heaton noted the PTDBO loop would contain the interval usage. Gary Lawrence reviewed the remainder of the 867IU explaining where it differed from the 867MU with respect to interval metering/usage.

Discussion moved onto changes to the 814C and 814E changes related to the 867IU/HIU transactions. Eric Heaton explained that if an ESCO enrolled a customer to obtain interval usage but the AMI had not yet been installed (phased installations are planned), that a status code rather than a rejection, would be provided.

Going back to the 867IU, Dan Stier asked how net metering would be addressed. Con Ed did not have an answer yet.

The BWG Chair noted that workpapers would be prepared in advance of a single purpose call to be held on 1/13/2017.

## **Communication to pending ESCO when enrollment is cancelled**

A workpaper containing the responses to four questions from each of the utilities was reviewed. Questions 3 and 4 were updated to reflect the discussion at the last meeting. Utility representatives provided further updates to fill in blank entries within the workpaper.

In response to a query from Anton Petrosyuk, all utilities verified that the pending ESCO could send a CHA to cancel the incumbent ESCO's CHA to cancel the switch to the pending ESCO.

Once the matrix is filled out, the EDI guides will be updated as appropriate. While new codes were initially a possibility, it does not appear as if they will be necessary at this point.

**Other Business**

- None.

**Establish Date/Time for Next Meeting**

A special one topic conference call regarding 867 HIU/IU EDI Standards development will be scheduled 1/13/2017. The next combined BWG/TWG meeting on Friday 1/20/2017 at 10 AM.

**Attendees**

Amie Williams – Agway	Samantha Curry – Starion Energy, Inc
Jason Gullo – National Fuel Resources	Laura Getz – DPS Staff
Anton Petrosyuk – Kiwi Energy	Elois Anderson – National Grid
Barbara Goubeaud – EC Infosystems	John Payton - IGS
Barbara White – Ambit	Veronica Munoz - Accenture
Charlie Trick – NYSEG/RG&E	Cindy Tomeny – National Grid
Craig Weiss – National Grid	Marie Vajda – NYSEG/RG&E
Dan Stier – Direct Energy	Mike Novak – National Fuel Gas Dist.
Deborah Croce – EC Infosystems	Jean Pauyo – O&R
Elorita Martinez – National Grid	Mary Do – Latitude
Angela Schorr – Direct Energy	Candace Cox – Direct Energy Business
Jeff Begley – NOCO Energy Corp	Sergio Smilley – National Grid
Gary Lawrence – Energy Services Group	Tom Dougherty – Marketwise
Janet Manfredi – Central Hudson	John Cooney – National Grid
Travis Bickford – Fluent Energy	Jennifer Lorenzini – Central Hudson
Kris Redanauer – Direct Energy	Mike Pawlowski – National Grid
Eric Heaton – Con Edison	Jodi Larison – UGI Energy
Jason Miller – Con Edison	Joy Huntley – UGI Energy
Kandi Terry – Just Energy	Susan Swiderski - NRG
Jennifer Vigil – Champion Energy	Adam Powers – Clean Choice Energy
Mary Agresti – National Grid	Jimmy Hughey – PSEG LI
Ray Cusick – Direct Energy	David Parnell – Direct Energy
Ana Ham – Con Edison	