

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – October 3, 2014

Administration

- Review/Modify Agenda: The Draft Agenda was adopted without modification; however it was noted that the proposed date for the next meeting would need to be discussed further.
- The 9/26/2014 Draft Minutes were adopted as Final with an addition to the attendee list.
- DPS – no remarks.

EDI Modification Priority Planning

The spreadsheet was not updated this week but it was noted that it would have been similar to the spreadsheet presented at the 9/12/2014 meeting.

Technical Working Group Discussion

The BWG Chair described the format he plans to use for the October 2014 EDI Report to be filed on 10/23/2014. A relatively short description of the standards documents that includes a discussion of related working group decisions and other recommendations will be provided. The EDI documents, in clean and redline format, will be provided as attachments to the report. As Draft Final versions of the EDI documents become available, they will be posted to the EDI Web Page. The working group should be prepared to discuss how much time, following issuance of an Order, is necessary to implement the EDI changes; a recommendation will be needed for the Report.

Mary Do and Gary Lawrence, lead the technical review of modifications to Implementation Guides & Data Dictionaries, respectively. Mike Novak lead the review of the Business Process documents, as applicable.

Significant decisions/Discussion points were as follows:

- 867 Consumption History Request & Response
 - IG - Page 62 updates update REF 02 segment, page 63, 64 updated, page 65 ICAP effective date DTM 007.
 - Data Dictionary – Page ii added ICAP effective date. Removed references to line numbers. Page 18 line 142 added class shape load. Page 15 lines 117-119 removed the DTM 582 segment. Page 19 added DTM 007 segment ICAP effective dates.
 - Business Process – There is no 867HU BP document.
 - The process is addressed within the 814HU BP document.
- 814 Consumption History Request & Response
 - IG - Page 12 conditional added, page 13 REF 1P added.

- Rick Tra noted that for REF 1P, Optional should be changed to Conditional.
- Data Dictionary – Page i notes – added REF 1P, page 3 lines 32-34 segment added.
- Business Process – Since some utilities respond with up to 12 months of usage (the UBP requirement) and others respond with up to 24 months, the term “Standard Period” was developed for general use within the BP document
 - Within its Utility Maintained EDI Guide, a utility will identify their Standard Period, i.e. the standard number of months (12 or 24 months) it provides in response to a request for historic interval data and/or usage data (to the extent data is available for the customer)
 - page 11 removed a utility-specific note, page 15 process name “standard period”, page 20 utility specific note revised.
- 814 Enrollment Request and Response
 - IG – Page 8 N106 removed. Page 11 parentheses added. Page 41 Industrial Classification Code. Page 49 Customer Tax Rate changed to mandatory. Page 52 added option field DTM AB4.
 - Data Dictionary – page 2 line 17 removed N106. Line number notes removed. Page 11 line 86 class load shape added. Page 18 lines 117-119 DTM AB4 added.
 - Business Process – Utility-specific references were removed/modified, otherwise there were no substantive changes.
- 814 Change (Account Maintenance)
 - Page 15 removed the notes to match other documents. Update page 44 (NYPA Discount Indicator change to remove indicator). Page 58 adding DTM segment – ICAP effective date Kim suggested to be AB4.
 - Data Dictionary – references to line numbers removed. Page 11 line 87 updated wording for class load shape. Page 16 added new DTM AB4 segment.
 - Business Process – There were no substantive changes.

The BWG Chair observed that the changes arising out of today’s meeting discussion were non-substantial. They will be reflected in the Draft Final versions and possibly in an abbreviated document for review at the next meeting.

EDI Glossary

There were no new modifications to EDI Glossary; the Glossary is essentially ready for the October 2014 EDI Report.

Test Plans

Modifications to Test Plans have not been started yet. The BWG will work with some members of the working group offline to prepare documents for review at the next meeting.

Internet Electronic Transport mechanism

GISB Electronic Data Mechanism (EDM) Version 1.4 will remain the standard for New York, however, use of GISB 1.5 and GISB 1.6 will be allowed. The first draft of the October 23 EDI Report will include the following language as a recommendations:

"Since the inception of EDI Standards in New York, the Gas Industry Standards Board (GISB) Electronic Data Mechanism (EDM) Version 1.4 has been the standard internet electronic transport mechanism. While not required by the February 25 Order, the EDI Work Group recommends that the standard be broadened to include GISB Electronic Data Mechanism Version 1.6 (GISB 1.6) but allow for grandfathering of existing GISB EDM implementations. GISB 1.6 is used in other states, notably Pennsylvania, for analogous retail choice EDI transactions and offers some security advantages. A hard cutover is unnecessary as existing GISB EDM implementations can co-exist with GISB 1.6 so long as Utilities, ESCOs and EDI service providers know which version is being used and configure the data exchange appropriately. Utilities are not compelled to update to GISB 1.6, but if/when they do they will work with the ESCO and/or their EDI Service Provider to coordinate the necessary configuration adjustments. In any event, ESCOs may only implement the version(s) supported by the utility."

NYPSC EDI Web Page Review

The October 2014 EDI Report will discuss various the recommendations; some of which can be implemented right away and others that will require further working group development.

Discussion/Update on non-Priority I items

There were no updates since last week's meeting.

Establish date/time for next meeting

The next meeting will be a combined BWG/TWG meeting on Tuesday 10/14 from 1 P.M. to 4:00 P.M. in place of the usual Friday time. The meeting that follows will be scheduled for Monday 10/20 or Tuesday 10/21; no meeting will take place on Friday 10/17.

Attendees

Mary Ann Allen - Integrys	Zeno Barnum – Hudson Energy
Jeff Begley – Fluent Energy	Mary Do – Latitude Technologies
Tom Dougherty – Aurea Energy Services	Jason Gullo – National Fuel Resources
Donna Satcher Jackson – National Grid	Gary Lawrence – Energy Services Group
Jennifer Lorenzini – Central Hudson	Mike Novak – National Fuel Gas
Veronica Munoz - Accenture	Jay Sauta – Agway Energy
JoAnne Siebel – O&R	Sergio Smilley – National Grid
Jim Stauble - Accenture	Robin Taylor – DPS Staff
Rick Tra – National Grid	Charlie Trick – NYSEG/RG&E
Kim Wall – PPL Solutions	Debbie Vincent – UGI Energy Services

