

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	Update Utility Specific Supplemental Guidelines	Revise New York Implementation Standard	Update Data Dictionaries	Business Process Documents	Test Plans	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.												
	ICAP Tag: A specific prospective customer's Installed Capacity (ICAP) tag, which indicates the customer's peak electricity demand.												
	Number of Meters: Customer's number of meters and meter numbers.												
	Meter Numbers: Customer's number of meters and meter numbers.												
	Account Settlement Indicator: Whether the customer's account is settled with the ISO utilizing an actual 'hourly' or a 'class shape' methodology.												
	NYPA / Recharge NY Indicator: Whether the customer receives any special incentives from the New York Power Authority.												
	Utility Discount Indicator: Whether the customer receives any special delivery or commodity "first through the meter" incentives.												
	Industrial Classification Code: The customer's Standard Industrial Classification (SIC) code.												
	Tax Exempt: Whether the utility identifies the customer as tax exempt.												
Priority I a	Customer Supply Status: Whether the customer is served by utility or another ESCO.												
	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.					
	Low Income Status: Provide a field for information on the customer's low income program enrollment status.							Customer privacy policies need to be develop.					
Priority II	ESCO Credit: Provide any required refund as a credit on the customer's bill.							EDI Optional					
	Full Service Bill Comparison: 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.							EDI Optional					

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Priority III	NYSERDA Inquiry from the Governor's Office about the provision of data to NYSERDA via EDI.							See Workpaper - NYSERDA Historic Usage Request Workpaper - dated 6/27/2014 See Draft Minutes - dated 6/27/2014		Utilities would like an official document .e.g. an official PSC letter or Order addressing what NYSERDA.			
	Net Metering EDI modifications T.B.D.												