

**Case 12-M-0476, et. al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Draft Minutes – January 22, 2016**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted – a preview of items to be discussed under Other Business was provided.
- The Draft Minutes from the 1/8/2016 EDI Business Working Group (BWG)/Technical Working Group (TWG) meeting were adopted as final without modification.
- DPS Staff Remarks
  - None

**Regulatory Update**

- There was no regulatory activity since the last meeting that impacted the EDI Working Group.

**Review of Implementation Plans**

Updates to the Implementation Matrix which were provided by each of the utilities in advance of the meeting were reviewed and discussed. Further updates to the matrix will be presented at the next working group meeting. It was noted that O&R planned to implement the CHU code on 1/25/2016. Some EDI Service Providers expressed concern that they were not notified in advance. The BWG Chair said the utilities should try to give ESCOs and EDI Service providers at least 30 days notice of changes although minor changes, e.g. addressing errors, etc. could be implemented on shorter notice. Since the perspective of what was “minor” could differ, it’s probably better to err on the side of at least 30 days’ notice when possible. Since the expedited testing rules are still new, parties should understand that there’s still a learning curve for all parties.

**Final Pre-Filing Review of Proposed Changes to Standards Documents – 1/29/2016 EDI Filing**

Changes to the Proposed Standards (Implementation Guides, Data Dictionaries and Business Process) documents made since the last meeting were reviewed.

- a. TOP & Supplements – Added Phase I to “Purpose” section.
- b. 810URR – There was additional clarifying discussion related to APP credits.
- c. 814C – A misspelling was corrected.
- d. 814D – A misspelling corrected. Based upon discussion, changes related to the timing for ESCO initiated Drops will be undone to be consistent with the UBPs.
- e. 814E
- f. 814HU
- g. 867HU
- h. 867MU
- i. 997
- j. Phase I Testing Application (included in the TOP Supplements)

**Other Business**

Discussion was held previewing potential EDI changes that will be discussed in more detail at upcoming working group meetings (after filing the 1/29/2016 EDI Report).

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- Utilities will review how long after a customer has been switched from an ESCO, as well as the circumstances, for the former ESCO continues to receive 814C transactions. The EDI Standards do not currently provide any guidance. If standard rules and procedures can be worked out they could potentially be recorded in the 814C Business Process document.
- There will be further discussion on how to address APP credit mistakes, e.g. if an ESCO sent a \$490.00 APP credit by mistake instead of \$4.90?
  - It appears as if allowing a “sign”, i.e. allowing for positive and negative APP Credits, might be helpful.
- There will be discussion on whether energy-related administrative charges can be billed under the UBR and URR models or whether they should be bundled into the commodity rate.
  - Practices from other states and POR/termination issues will be investigated.

**Establish date/time for next meeting**

The next meeting will be a combined BWG/TWG meeting on Friday 2/12/2016 at 10 AM.

**Attendees**

Mary Agresti – National Grid	Jeff Begley – NOCO
Travis Bickford – Fluent	Debra Crochie – EC Infosystems
Mary Do – Latitude Technologies	Grisel Garcia – Con Ed
Barbara Goubeaud – EC Infosystems	Eric Heaton – Con Ed
Gary Lawrence – Energy Services Group	Jennifer Lorenzini – Central Hudson
Janet Manfredi – central Hudson	Veronica Munoz – Accenture
Ewen Ng – EARTH Corporation	Mike Novak – National Fuel Gas
Jean Pauyo – O&R	Kris Redanauer – Direct Energy
Sergio Smilley – National Grid	Robin Taylor – Dept Public Service
Jasmine Thom – CES	Charlie Trick – NYSEG/RG&E
Marie Vajda – NYSEG/RG&E	Jennifer Vigil – Champion
Debbie Vincent – UGI Energy Services	Kimberly Wall – PPL Solutions
Barbara White – Ambit Energy	Amie Williams – Agway