

**Case No. 12-M-0476 et al.**  
**EDI Business/Technical Working Groups Agenda**  
**August 27, 2020 – 10:00 AM to 12:00 PM**

GTM (no audio) link: <https://global.gotomeeting.com/join/806330517>

Conference Call Information:

Toll Free Phone Numbers: **844-633-8697**

Local Phone Number: **518-549-0500**

Meeting ID: **34300254**

1) **Welcome**

- a. Attendance
- b. Review/modify agenda
- c. DPS staff remarks

2) **Bill option change control:** Kim Wall and Josh Pasquariello

- a. Supplier/service provider response to Jus
  - Kim Wall goes over the supplier responses.
  - Josh P. believes the working group is not the forum for pushing a change request through the commission. He suggests that the suppliers can have a meeting with staff to discuss the next steps and leave it to staff to decide or suggest a path forward.
- b. Decision on next steps
  - Kim Wall goes over the next steps of the commission process which would have both sides of the issue and leave it to the commission to decide.

3) **24-month meter data and COVID:** Milton Liu, Engie Resources

- historic data is not reflecting future usage in NYS. Other states utilize a transmission of historic data from 24 months in the past. Milton w/ ENGIE suggests all NYS utilities should provide 24 months of historical data to ensure there is consistency with other markets across the country.
- Pete Foster states the current requirement for NYS utilities is 12 months of historic data. He states some (NYSEG RGE provides 12 months via edi, 24 months on their website) NYS utilities provide 24 months. ConEd and O&R sends 24 months of electric data and 12 months of gas.
- Workpaper adjustment- Historical usage category adjustment to show what utilities are sending when it comes to this data.
- Jim with Customized Energy asks if the 24 months is specific to historical and interval usage. He states that the file sizes with the new information would potentially cause issues with transmission (increased transactions in files could slow overall data processing).
- It is noted that the 867HU EDI Standards state that the file can contain 24 months of data.
- Greg Accardo comments that utilities will send what they agreed to send in their tariffs.

4) **EDI standards:** Jim Wade, Customer Energy Solutions

a. Link on work-paper

Jim states that there should be a consolidation of information to get the necessary specifications. He requests an example document provided with the specifications document would be beneficial to suppliers and providers and would bring NYS into compliance with best practices in other state retail energy markets.

b. Utility add-on standards

-Both NYS document standards and utility document standards need to be consistent.

-Staff will work with Jim Wade and other parties to see how the EDI guides can be updated.

5) **NYPA discounts on 867 usage transaction:** Kim Wall

-special incentive field, there is a field to include a discount code for community solar recipients, and the discount code is specific to community solar for NYPA and recharge NY. It is confirmed that the 867 Historical Usage would reflect if a customer participates in recharge NY, which is a NYPA Program.

6) **Net metering:** pending utilities answering questions previously sent

-Still waiting on answers from certain utilities. Nothing worth discussing until all parties provide comments.

7) **Establish Date/Time for Next Meeting**

a. Recurring meetings the 4<sup>th</sup> Thursday of the month from 10 AM – 12 PM

b. Next call September 24, 2020

8) **Final Adjournment**

10:40am

**Attendees**

Susan Phinnessee – Constellation	Tom Rankin – Marketwise
Frank Nunes - EC Infosystems	Gary Lawrence - Energy Services Group
Emily Cimolie – Clean Choice Energy	Amy Delooza – Agway
Kim Wall – HansenX	Pete Foster – NYSEG RGE
Mike Mastroianni – Fluent Energy	Jeff Begley – NOCO Energy
Mike Bachan – Central Hudson	Stephen Wilson – Vistra Energy
Julia Goodchild – Direct Energy	Janet Manfredi – Central Hudson
Tracy Gatano – IGS	IgueHita Odomore – ENGIE
Josh Pasquariello – National Grid	Christine Hughey – Big Data Energy
Bianca Merine – O&R	Tom Dougherty – Market Wise
Jen Lorenzinni – Central Hudson	David Tidman – Constellation
Greg Accardo – National Grid	Milton Liu – ENGIE
Jim Wade – Customized Energy	Samantha Curry – Starion Energy
Barbara White – Ambit Energy	Diane Neira – NYSEG RGE
Eric Heaton – ConEd	Nicole Barker – National Fuel
Kris Redenauer – Direct Energy	Debbie Rabago – Ambit Energy