

**Case No. 12-M-0476 et al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Final Minutes - September 7, 2018**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted without modifications.
- The Draft Minutes from the 8/10/2018 meeting were adopted as final without modification.
- DPS Staff Remarks: None.

**Regulatory Update**

The BWG Chair noted that while there had no specific action impacting EDI since the last working group meeting, with regard to matters in Case No. 18-M-0376 and the informal process that has been underway concerning cyber security matters, the deadlines for submitting the Amended Self-Attestation form and Data Security Agreement had passed. DPS Staff is preparing a report on cyber-security matters to be filed in 18-M-0376 on September 24, 2018.

**Updates to EDI Implementation Plan(s)**

- a. Current EDI Standards Matrix

The BWG Chair reviewed the matrix noting that an updated explaining UBR utility implementation would be reflected in the matrix for the next meeting. The updated note will read as follows:

UBR Utilities have the option to employ AMT\*7 when the ESCO issuing the GSP credit is no longer serving the customer or in Dual Bill situations [Grid is exercising this option]. Otherwise, a UBR Utility may use a cancel/rebill to re-open a billing window when the customer is no longer served by the ESCO issuing the GSP Credit or a non-EDI process for dual bill situations. [NYSEG/RG&E is taking this approach].

Otherwise, there were no further changes provided during the meeting.

**Next EDI Report**

The BWG Chair announced that the next EDI Report filing would tentatively be scheduled for November 30, 2018. The report will include 814HU Errata, 814C Errata, updated 814C Gray Box Note Conventions and TOP Updates to reflect changes to the updates to the EDM under consideration. The date could change depending upon events in 18-M-0376.

## **Proposed New EDI Transaction - Sync Lists**

The BWG Chair reviewed an updated workpaper that now included the file structure for NYSEG/RG&E and National Grid (Downstate). Jennifer Lorenzini (Central Hudson) will provide their structure for the next meeting. Sergio Smilley (National Grid) explained that National Grid (Upstate) currently provides sync lists manually but has a project underway to automate provision of sync lists in a similar format as is in place for Grid's downstate territories.

The TWG Chair was not present but the BWG Chair relayed her concerns that if there were too many segments in the new transaction, that the size of the file for large ESCOs could be so large that it could overwhelm EDI translators. The TWG Chair requests that each utility provide the number of customers for their largest ESCO (without identifying that ESCO) to assist with the design of the new transaction. The BWG Chair suggested review of the UBPs to understand the purpose of the sync list and that the TWG Chair's concerns could be address by eliminating segments that contained data that could be provided elsewhere. For example, National Grid's sync list contains only a few items while both ConEd and National Fuel contain several more items.

The BWG Chair said that the UBP requiring provisions of sync lists would be added to the workpaper for the next meeting.

## **GISB EDM Discussion**

Based upon the presentation from Mary Do (Big Data Energy) at the last meeting, the TWG Chair has proposed that the New York EDI Standards be upgraded to reflect GISB 1.6 as the minimum EDM. The BWG Chair presented a workpaper reflecting some of the changes to the TOP Standards document that would be necessary and noted that compliance should be relatively easy for ESCOs and EDI Service Providers who operate in other states where GISB 1.6 is already the standard. The workpaper reflected optional use of GISB 1.8 and GISB 1.9 in the same manner as optional use of GISB 1.5 and GISB 1.6 are currently permitted.

The BWG Chair noted that it may be more cost effective to upgrade to GISB 1.9 now, particularly if Texas makes that decision. There are costs and required testing to upgrade to 1.6; if New York upgrades to 1.6 now and then other states move to 1.9, New York would again be behind the industry best practice and another round of could and testing would be required. All parties need to investigate the costs associated with either upgrade path.

The BWG Chair noted that to fully develop modifications to New York's TOP document, parties need to have access to the NAESB Standards which are copyrighted. Access is gained by being a member of NAESB or by purchasing a copy of the standards for a nominal fee (\$250). The BWG Chair has approached NAESB for a waiver of the copyright for this instance. Another approach may be to submit a request to have NAESB recommend the necessary modification to the New York TOP once a decision is made between GISB 1.6 and GISB 1.9.

Sergio Smilley asked about the time table to implement an upgrade noting that with everything going on this will be a major project. The BWG Chair said that the first step was to

determine whether the upgrade should be to 1.6 or 1.9 but from there, at least 6 months. Smiley suggested that it could take as long as a year; particularly to include testing.

For next meeting, the BWG Chair encouraged those with access to NAESB Standards to review “Book 4” which will be critical for updating Attachment C in the TOP. The BWG Chair also asked ESCOs to provide their experience with updates in other states and share their discussions with their EDI providers concerning how much time would be necessary. Any experience, any thoughts would be welcome.

The will be more discussion at next meeting.

**Other Business**

Mary Do ask utilities to make sure their supplemental guides are up-to-date with the more recent EDI Reports/updates that have been filed. This would assist a lot of ESCOs and EDI suppliers.

Christine Binmore (XOOM Energy) ask if any further extension for the UBP updates beyond September 24 had been granted. The BWG Chair was unaware but suggested the first step might be to contact DPS Staff.

**Establish Date/Time for Next Meeting**

The next meeting combined BWG/TWG meeting is scheduled for Friday 9/21/2018 at 10 AM.

**Attendees**

Alan Castro - EC Infosystems	Debra Croce - EC Infosystems
Rosie Garlapow - NFR	Sergio Smiley - National Grid
Gary Lawrence - Energy Services Group	Tom Rankin- Marketwise
David Tidmen - Constellation	Liz Ciborowski - NYSEG/RGE
Jim Wade - Customized Energy Solutions	Samantha Curry - Starion Energy
Bobby Hemphry - Constellation	Mary Do - Big Data Energy Services
Amy Delooza - Agway Energy	Mike Day - IGS
Barbara White - Ambit Energy	Mike Novak - National Fuel Gas Dist.
Veronica Munoz - ATMS	David Parnell - Direct Energy
Pete Foster - NYSEG/RGE	Rebecca Sweeney - DPS Staff
Christina Binmore - XOOM Energy	Travis Bickford - Fluent Energy
Jeff Begley - NOCO	Angel Alvarez - Con Ed
Jennifer Lorenzini - Central Hudson	Barbara Goubeaud – EC Infosystems