

Case No. 12-M-0476 et al.
EDI Business/Technical Working Groups Agenda
January 28, 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: **872-240-3412**

Meeting ID: **806330517**

1) **Welcome**

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

2) **Leadership Team:** Josh Pasquariello

-Jim Wade of Customized Energy joining as technical lead. Kayla Austin assisting with focus on ESCO side of the call.

3) **Review of Old Business:**

- a. 867 bill option – John Sheevers
-Staff is in receipt of the JUs comments and is now discussing with management team how to proceed.
- b. GISB/TLS time frames – Josh Pasquariello

-Josh requesting utilities to be up to date with the content in the workpaper. Some sections have not been updated by utilities in quite some time. Josh and Kim has been asking for Utilities to audit their respective sections to ensure the spreadsheet is as up to date as possible.

4) **NY Reset Order:** Stephen Wilson

-Process review of what the industry can expect with the reset order.

- a. rate ready credits

-Stephen inquiring if the utility guides and processes are able to support the changes in the market place. Utilities state the processes are in place to facilitate the transmission of rate ready credits. Questions focus on the AMT7 segment/element.

-NYSEG RGE states they use an 810 to complete the process and can make manual adjustments to accounts if needed. They

-Central Hudson allows GSP credits on 814 change document.

b. bill ready credits

-NIMO downstate uses the 503 and 820 to communicate the credits. Kim Wall inquired if AMT7 in use to get credit back to customer in the event that the customer is no longer enrolled with ESCO.

c. GR values on 820s

-Discussion focused on the applicable values and their functionality to ensure no issue comes up with the data transmissions.

d. 503 Transactions

-NYSEG does not have the 503 transaction in use at this time.

-ConEd does not have the 503 transaction in use at this time.

-NIMO has the 503 in use.

-O&R 503 not in place and testing is on hold as they are in the process of implementing a new billing system. They use a manual process to perform the 503 transaction at this time.

5) **Utility Information:** Jim Wade

a. EDI guides

-EDI Webpage that enables suppliers to review EDI guides. Some links are broken, some links show no updates. Suggestion is to audit the links to see what is broken/out of date.

-Issue with EDI Guides on utility sites as well. The ask is for all utilities check their guides/links on the PSC site and on their respective sites to ensure all documentation is correct and up to date.

-Jim suggests a master EDI guide for the whole state.

- Staff advised there is a formal process involved in updating guides, but it's doable.

b. utility links on PSC site

-NFG's link is not up to date on the Utility Guide Page.

6) **Other Business**

-Kim Wall brought up the AMT7 segment, currently identified as only being used for guaranteed savings. Kim asks, if in the event of a billing error and the supplier is required to provide guaranteed savings, and utilities are unable to use the AMT7 for a bill error correction, that the AMT7 be used for guaranteed savings bill error corrections.

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

2/25/2021 10:00am

8) **Final Adjournment**

10:58 am

Attendees

Frank Nunes - EC Infosystems	Gary Lawrence - Energy Services Group
Kim Wall – HansenX	Amy Delooza – Agway
Mike Mastroianni – Fluent Energy	Pete Foster – NYSEG RGE
Mike Bachan – Central Hudson	Jeff Begley – NOCO Energy
Josh Pasquariello – National Grid	Stephen Wilson – Vistra Energy
Bianca Merine – O&R	Julie Goodchild – Direct Energy
Jim Wade – Customized Energy	Tom Dougherty – Market Wise
Ophelia Heard – ENGIE	David Tidman – Constellation
Eric Heaton – ConEd	Nicole Barker – National Fuel
Greg Accardo – National Grid	Debbie Rabago – Ambit Energy
Emily Cimolie – Cleanchoice Energy	Jen Lorenzini – Central Hudson
Stephen Wilson – Vistra Energy	Janet Manfredi – Central Hudson
Ophelia Heard – ENGIE	Tom Rankin – Marketwise
Samantha Curry – Starion Energy	Pam Thompson – IGS Energy
Andrew Revie – O&R	Jim Cifaratta – Smartest Energy
Jill Asencio – Con Edison	Diane Neira – NYSEG RGE
Alex Derosa - ENGIE	Deidre Davis - Constellation