

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Draft Minutes – August 21, 2015

Administration

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The Draft Minutes from the 7/21/2015 EDI Business Working Group (BWG)/Technical Working Group (TWG) meeting were adopted without modification.
- DPS Staff Remarks
 - Robin Taylor provided an update on website issues. Staff is working with the new vendor to fix website issues. A work-around used to upload documents; this process takes longer because Staff has to wait on the vendor to respond with links. Staff will continue to work with vendor to get issues resolved.
 - The Order recommending adoption of the recommendations from the April 7, 2015 EDI Report should be on the September 17, 2015 PSC Session Agenda. A SAPA notice was submitted for the July 24th EDI Report (July EDI Report). The earliest action date for the report is in October. Pending any comments received, it is most likely that an Order on the July EDI Report will be on the PSC's November Session Agenda.

Review of 11/2/2015 Implementation Plans – Discussion on timing, etc

A workpaper showing a matrix prepared by Tom Dougherty was reviewed. The BWG Chair noted that the matrix had not been filled in completely, most likely due to vacations. Additionally, the lower half of the matrix shows the APP related transactions as if their implementation had been ordered. The BWG gave a review of the expected regulatory process and that the matrix should be modified to show some anticipated dates when those items could potentially be ordered for planning purposes. The BWG Chair noted that today's Staff Remarks shed some light on potential dates.

Kris Redanauer, Barbara Goubauad and Debbie Rabago will work with Tom Dougherty and the BWG Chair to reconfigure the matrix which will then be re-circulated to the utilities. Where Orders are pending, utilities should submit soft dates.

Utility Supported EDI Transactions

- A posted workpaper showing a matrix listing the transactions and the direction of the transactions (inbound/outbound) from the utilities perspective. Based upon review, several transactions were identified as bi-directional and the matrix will be modified accordingly.
- It was noted that while transactions for ESCO responses are in the EDI Standards, non-EDI responses were often more effective and in reality, how most ESCOs respond to some utilities.
 - Utility EDI Guides should include whether utility supports the ESCO response beyond just accepting the transaction.
- EDI Service Providers are concerned that in many cases the Utility EDI Guides have not been made available.
 - The BWG Chair reminded utilities to get their guides posted and the links provided to Staff.
- The BWG Chair asked if ESCOs send responses to utility initiated 814C requests. Some but not all ESCOs send the response but it seemed likely that some utilities ignore the ESCO responses. The items a Utility changes via the 814C tend not to require a response but on the few occasions

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where an ESCO has a response (because they know the utility's information is incorrect) probably a non-EDI response is more effective.

- Later discussion determined this issue likely pertained to other transactions also.
- It was noted that Utility EDI Guides should include whether the utility processes the ESCO response.

New Items

a. Proposed addition of NYISO zone and/or the gas pooling area to 867HU PTD^FG loop

Charlie Trick described the proposal. The primary purpose of the change, which proposed to copy segments from the 814C/814E into the 867HU, was to provide ESCOs with important information prior to enrollment. There was no conceptual objection to the proposal although the use of gas pools in post-enrollment transactions needs to be considered to ensure there are no conflicts or to avoid potential confusion. Charlie Trick, Kim Wall and Mike Novak will develop an updated workpaper for the next working group conference call.

b. Proposed addition of REF*BLT segment to the 867MU

The TWG Chair noticed the 814MU transaction did not contain the bill option. For Rate Ready implementations, the option is sent on 810 transaction but Bill Ready utilities do not send it. If the segment were added to the 867MU, there would be a consistent to notifying ESCOs which type of bill is being sent to the customer, if it has changed, etc.

c. Proposed removal of obsolete budget billing segments & codes – 814C/814E

The proposed changes were as follows:

- 814C: Remove AMT*B5 (ESCO Budget Plan Installment Amount) segment
- 814C: Remove Codes AMTB5 and AMTBD from REF Reference Identification (Reason for Change - Account Level) segment
- 814E: Remove AMT Monetary Amount (ESCO Budget Plan Balance) segment
- 814E: Remove AMT*B5 (ESCO Budget Plan Installment Amount) segment

The BWG Chair asked utilities if they currently supported the segments in their implementations –no one replied affirmatively. No one objected on call to removing the segment and codes. The BWG Chair noted an error in the workpaper (an extraneous non-impacted segment) and if the error materially impacts the proposal, a revised workpaper will be posted.

Other Business

None

Establish date/time for next meeting

The next meeting will be a combined BWG/TWG meeting on Friday 9/11/2015 at 10 AM.

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Attendees

Jeff Begley – NOCO	Travis Bickford – Fluent Energy
Suzanne Clark – Liberty Power	Debra Crochie – EC Infosystems
Mary Do – Latitude Technologies	Thomas Dougherty – Aurea Energy Services
Barbara Goubeaud – EC Infosystems	Gary Lawrence – Energy Services Group
Jennifer Lorenzini – Central Hudson	Veronica Munoz – Accenture
Mike Novak – National Fuel Gas	Jean Pauyo – O&R
Debbie Rabago – Ambit Energy	Kris Redanauer – Direct Energy
Robin Taylor – DPS Staff	Jasmine Thom – CES
Charlie Trick – NYSEG/RG&E	Marie Vajda – NYSEG/RG&E
Debbie Vincent – UGI Energy Services	Amie Williams - Agway
Jay Zhang – Just Energy	Kim Wall – PPL Solutions