

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – July 25, 2014

Administration

- Review/Modify Agenda: The Draft Agenda was adopted. A suggestion regarding a pre-enrollment alternative for the 867HU transaction was directed to be addressed under Agenda Item 5 a.
- The 7/18/2014 Draft Minutes, after being modified to correct the description of Grid's provision of meter information within the 867 HU and update the attendance list, was adopted as Final.
- DPS – no remarks.

EDI Modification Priority Planning

The BWG reviewed the updates to the spreadsheet capturing the proposed transaction assignments proposed during the July 18, 2014 meeting.

Technical Working Group Discussion

Pre-Enrollment Determination of EDI Transaction for non-usage items

Rick Tra (Grid) suggested adding another indicator in the LIN segment of the 814 HU Request to request Low Income data. The response would result in all of the new non-usage items being provided in the PTG*FG loop. Additionally, it wouldn't impact responses for historical usage or gas profile because those transactions would be in response would be to separate existing indicators. Con Ed agreed with the concept of new PTD loop for the new items but observed that of the seven new items, only one is low income. It was suggested that another name, e.g. Supplemental Items, might be more appropriate.

NFG was hesitant to include the low income item with all the other new items and suggested that given the privacy sensitivity associated with this item, another new indicator specifically for that item might be worth consideration. Some ESCOs may not decide to serve low income and if all of the items were in one transaction, they can see if the customer falls in that category.

Tom Dougherty (ISTA) thought most of the suppliers would want a majority of the data, and maybe a smaller community that would want only the new non-usage items. He was also concerned about suppliers having to make multiple requests to get the information on a regular basis. Constellation agreed stating they would like to have it all on one transaction. The TWG Chair suggested that Grid's proposed code could be used but that another generic code could be used to get all the data.

Debbie Vincent expressed concern that use of pre-enrollment 814 Responses for provision of new non-usage items would be noncompliant with NAESB and ANSI X12 requirements that a response is just supposed to be a response. Ambit agreed and stated that use of a PTD loop with the 867 HU is consistent with ANSI X2 standards. The BWG Chair explained that New York's EDI standards pre-dated the NAESB Retail EDI Standards and that while much of NY Standards were consistent, there was no absolute requirement that they be made to comply. He added that he understood that ESCOs operating in

multiple states desire as much standardization as possible. Even so, differences in customer choice programs from state to state made the degree of standardization present in the wholesale market unachievable.

A final decision needs to be made by next Friday for the technical team to begin working on these. ISTA asked that each participant on call send note to the TWG Chair stating their transaction assignment preference. The TWG chair asked that the notes be sent by via email by Tuesday COB. On Wednesday, an email will be sent out to everyone as to what the results are.

Post-Enrollment Determination of EDI Transaction for non-usage items

The TWG Chair reviewed three workpapers:

- **814 Enrollment Response – New Segments - Workpaper**
 - NYPA/Recharge Indicator – there was no objection to locating the item in this transaction but it was noted that since there are not that many accounts statewide, a non-EDI solution may be more appropriate.
 - Utility Discount Indicator – there was no objection to locating the item in this transaction but: the scope of accounts to be included is not yet determined. Mike was supposed to get more information from Staff.
 - The Customer Supply Status is not needed for change response and will be removed from this transaction. The status would have been received pre-enrollment and the ESCO receiving a positive enrollment response knows it will be the supplier. O&R questioned the business need for this field. UGI though it might be useful for accelerated switching and could be left in NY changes the enrollment timelines. TWG will discuss this further with the BWG.
 - Industrial Classification Code - It was noted that Utility use of SIC or NAISC codes has been decreasing so the data may not be available or not accurate when available.
 - Tax Exempt Indicator – It was noted that the BWG has previously developed explanatory language for this item and it should be included in the guides as Comments/Notes.
- **814 Change Request – New Segments – Workpaper**
 - The Customer Supply Status will be removed because it is known. The ESCO supplying the customer is the only ESCO that would be able to request a change transaction.
 - The REF items can only be changed by the utility; ESCOs cannot change these items.
- **814 Change Response – New Segments - Workpaper**
 - Change request codes for the new items cannot be sent by ESCOs; only utilities can change these items. As a result, the proposed changes will be scrapped.

Establish date/time for next meeting

The next meeting will be a combined BWG/TWG meeting on 7/25/14 at 10 A.M. The primary focus will be development of pre-enrollment transactions, as appropriate, for the Phase I items.

Attendees

Jeff Begley – Fluent Energy	Mary Do – Latitude Technologies
Tom Dougherty – ISTA	Joe Falcon – Ambit Energy
Giovanni Formato – Con Edison	Christine Hughey - Constellation
Jennifer Lorenzini – Central Hudson	Janet Manfredi – Central Hudson
Veronica Munoz – Accenture	Mike Novak – National Fuel Gas
Debbie Rabago – Ambit Energy	Jay Sauta - Agway
Joann Seibel – O&R	Sergio Smilley – National Grid
Jim Stauble – Accenture	Robin Taylor - DPS
Carol Teixeira – National Grid	Rick Tra – National Grid
Debbie Vincent – UGI Energy Services	Charlie Trick – NYSEG/RG&E
Jean Pauyo – O&R	Gary Lawrence – Energy Services Group