

**Case 12-M-0476, et. al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Final Minutes – September 5, 2014**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted. The BWG Chair clarified that some of the “to do” items from last week’s meeting would be discussed during the TWG section of the agenda.
- The 8/29/2014 Draft Minutes were adopted without modification as Final.
- DPS – no remarks.

**EDI Modification Priority Planning**

The spreadsheet was not updated this week but it was noted that it would have been similar to the spreadsheet presented at the 8/29/2014 meeting.

**Update on EDI Outreach Communication to REMS forum**

The BWG Chair noted that a few responses had been received (or were promised) and that no objections to the course to be taken for October EDI Report filing had been provided. Generally, the responses focused on the provision of utility full service billing information which is a potential area of EDI development following submission of the October Report and an Order lifting the Stay on low income matters.

**Technical Working Group Discussion**

On the issue of whether to use the Foresight EDISM tool or Word for the EDI Implementation Guides, Mike Novak contacted John D’Aloia from DPS Staff. He confirmed that Foresight is occasionally helpful when Phase I testing is done, particularly in cases when there is a new service provider, but it is not essential. Kim Wall reviewed the benefits of using Foresight focusing on how it helps to ensure that new items are constructed properly so that EDI translator errors are avoided.

A decision was made to use Foresight to check additions to the EDI standards and to prepare the Implementation Guides to be filed with the Commission. Word will be used for the other documents to be filed as well as to create the versions of the IGs discussed during working group meetings.

There was also related discussion on Syntax Notes. It was noted that some segments in the IGs appeared to be missing Syntax Notes. A more thorough review will take place prior to the next meeting and corrections will be proposed.

Following up on an idea presented at the 8/29/2014 working group meeting, a new web page containing older versions of the EDI Standards will be created and links to the PSC’s existing EDI Standards web page. Other related web pages will be reviewed by the working group and proposed updates to remove outdated material as correct non-functioning links will be made.

Mary Do, assisted by Gary Lawrence, lead the technical review of modifications to Implementation Guides & Data Dictionaries

- 814C Change (Account Maintenance) IG
  - For segment AMT Monetary Amount (ICAP), the responses for AMT03 will be changed from “Y” to “C” and “N” to “D” – an explanatory note will be added.
- 814C Change (Account Maintenance) DD
  - A reference to O&R on row 97 will be generalized and flagged for relocation to their Utility Specific EDI Guide.
  - Changes will be made to conform to changes in the IG.
  
- 814E Enrollment Request and Response IG
  - Changes analogous to those made for the 814G IG will be made to segment AMT Monetary Amount (ICAP) for AMT03.
- 814E Enrollment Request and Response DD
  - Changes will be made to conform to changes in the IG and a reference to ESCO Referral programs will be removed.
  
- 867HU Consumption History Request & Response IG & DD
  - AMT Monetary Amount (ICAP)-AMT03 changes will be made, including a segment name change.
  
- 814HU Consumption History Request & Response IG & DD
  - No changes necessary.

The BWG chair noted that an email message will be sent out letting recipients know that the working group considers these finalized and ready for the report. Absent an objection, remaining changes would likely be limited to those identified through use of the Foresight tool.

The BWG Chair reviewed redlines to the EDI glossary which appears to have been last updated in 2001. Working group members were asked to review this document and propose changes to be reviewed at the 9/12/2014 meeting.

### **Task Assignments**

The BWG Chair asked for volunteers to begin review of the Business Process Documents and Test Plans to make changes that conformed to the new IGs.

### **Priority I A Discussion**

There were no updates since last week’s meeting.

### **Priority II Discussion**

There were no updates since last week’s meeting.

### **Priority III Discussion**

There were no updates since last week's meeting.

### **Establish date/time for next meeting**

The next meeting will be a combined BWG/TWG meeting on 9/12/14 at 10 A.M. The primary focus will be technical development, as appropriate, for the Phase I items.

### **Attendees**

Jeff Begley – Fluent Energy	Mary Do – Latitude Technologies
Jeremy Euto – National Grid	Tom Dougherty - ISTA
Giovanni Formato – Con Edison	Jason Gullo – National Fuel Resources
Gary Lawrence – Energy Services Group	Jennifer Lorenzini – Central Hudson
Janet Manfredi – Central Hudson	Veronica Munoz - Accenture
Mike Novak – National Fuel Gas	Jean Pauyo – Orange & Rockland
Debbie Rabago – Ambit Energy	Donna Satcher – Jackson – National Grid
Robin Taylor – DPS Staff	Carol Teixeira – National Grid
Cindy Tomeny – National Grid	Rick Tra – National Grid
Charlie Trick – NYSEG/RG&E	Kim Wall – PPL Solutions
Sergio Smilley – National Grid	Brian Meredith - ISTA
Zeno Barnum – Hudson Energy	Jay Sauta – Agway Energy Services