

NY EDI Working Groups - Workpaper
 Order CASE 12-M-0476 - Proceeding on Motion of the Commission to Assess
 Certain Aspects of the Residential and Small
 Non-residential Retail Energy Markets in New York State.

| | Requirement | Milestones | | | | | Project Plan | | | | | | |
|--|--|---------------------------|---|---|--------------------------|----------------------------|--------------|--|-------------|--------|-------------------|-------|--------|
| | | Determine EDI Transaction | Update Utility Specific Supplemental Guidelines | Revise New York Implementation Standard | Update Data Dictionaries | Business Process Documents | Test Plans | Notes / Comments / Follow Up's | Next Action | Status | Responsible Party | Start | Finish |
| Priority I | Enrollment Rejection Codes: When a utility rejects an EDI enrollment, the utility provides a reason code. | | | | | | | | | | | | |
| | ICAP Tag: A specific prospective customer's Installed Capacity (ICAP) tag, which indicates the customer's peak electricity demand. | | | | | | | | | | | | |
| | Number of Meters: Customer's number of meters and meter numbers. | | | | | | | | | | | | |
| | Meter Numbers: Customer's number of meters and meter numbers. | | | | | | | | | | | | |
| | Account Settlement Indicator: Whether the customer's account is settled with the ISO utilizing an actual 'hourly' or a 'class shape' methodology. | | | | | | | | | | | | |
| | NYPA / Recharge NY Indicator: Whether the customer receives any special incentives from the New York Power Authority. | | | | | | | | | | | | |
| | Utility Discount Indicator: Whether the customer receives any special delivery or commodity "first through the meter" incentives. | | | | | | | | | | | | |
| | Industrial Classification Code: The customer's Standard Industrial Classification (SIC) code. | | | | | | | | | | | | |
| | Tax Exempt: Whether the utility identifies the customer as tax exempt. | | | | | | | | | | | | |
| Customer Supply Status: Whether the customer is served by utility or another ESCO. | | | | | | | | | | | | | |
| Priority I a | Energy-related value-added service indicator: The ESCO to provide information identifying whether the customer is purchasing an energy-related value-added service and the nature of that service. | | | | | | | Energy related value added services needs to be defined. | | | | | |
| | Low Income Status: Provide a field for information on the customer's low income program enrollment status. | | | | | | | Customer privacy policies need to be develop. | | | | | |
| | ESCO Credit: Provide any required refund as a credit on the customer's bill. | | | | | | | EDI Optional | | | | | |
| Priority II | Full Service Bill Comparison: ESCO must be able to compare actual customer bills to what the customer would have been billed at the utility's rates and, on at least an annual basis. | | | | | | | EDI Optional | | | | | |

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| Priority III | NYSERDA Inquiry from the Governor's Office about the provision of data to NYSERDA via EDI. | | | | | | | See Workpaper - NYSERDA Historic Usage Request Workpaper - dated 6/27/2014 See Draft Minutes - dated 6/27/2014 | | Utilities would like an official document . . e.g. an official PSC letter or Order addressing what NYSERDA. | | | |
| | Net Metering EDI modifications T.B.D. | | | | | | | | | | | | |
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