

Case 12-M-0476, et. al.
EDI Business Working Group (BWG)/
Technical Working Group (TWG)
Final Minutes – August 8, 2014

Administration

- Review/Modify Agenda: The Draft Agenda was adopted.
- The 8/1/2014 Draft Minutes, after being modified to add clarify commentary regarding use of the 867 HU transaction, as well to update the attendance list, was adopted as Final.
- DPS – no remarks.

EDI Modification Priority Planning

No update to the spreadsheet capturing the proposed transaction assignments was prepared but the BWG Chair noted that the modifications that would have been made as a result of the August 1, 2014 meeting will be covered in the TWG's Workpaper for Transaction Assignment Preferences.

Update on EDI Outreach Communication to REMS forum

The BWG Chair provided a 3-4 page letter providing a progress report and a discussion of the anticipated contents of the October EDI Report filing to Michael Meath who will circulate the documents to the REMS email list. Workpapers regarding ERVAS development and Utility Maintained EDI Guides were also provided. Recipients, who should receive the email within the next week, will be asked to provide informal comments concerning five topics/questions by August 31, 2014. As responses are received, the BWG will review them during meetings in August and early September in preparation of the October EDI Report.

Technical Working Group Discussion

Pre-Enrollment Determination of EDI Transaction for non-usage items – follow up
Post-Enrollment EDI Transaction changes for non-usage items – follow up
Identification of Manuals, Guides and Data Dictionaries to be modified

Five workpapers were posted for the meeting:

- Workpaper - Transaction Assignment Preferences
- Workpaper - 867 Implementation Guide Draft
- Workpaper - 814 Historical Response - New Segments
- Workpaper - 814 Change Response - New Segments
- Workpaper - 814 Enrollment Response - New Segments

The TWG Chair reviewed the workpapers as a part of the discussion. The Transaction Assignments Preferences Table was updated to reflect the decisions made at the 8/1/2014 Meeting.

The 867 Implementation Guide (IG) Draft was reviewed next. Based upon discussion, the following changes were noted:

- Under the Summary of Changes within the IG Draft-Introduction, the date for Version 1.2 should be changed to the anticipated October EDI Report filing date – October 23, 2014.

- For page 31 of the IG Draft, the BWG Chair will provide clarifying language to the TWG Chair for the Notes to indicate the PTD*BQ loop is not required when usage is reported on an account basis or when a gas profile is provided. Notes will also be included on page 73 and 74 to indicate analogous optionality within the PTD*FG loop.
- For pages 64-74 of the IG Draft, consistent with the note on page iv of the IG Draft-Introduction, **Loop:** will be changed from **PTD Mandatory** to **PTD Optional (Must Use)** or where appropriate, **PTD Optional (Dependent)**. Similarly, **Usage:** will be changed from **Mandatory** or **Optional** to **Optional (Must Use)** to indicate the item is required for NY EDI, but optional under X12 Standards.
- For page 64 of the IG Draft, the Note will be enhanced to indicate that the PTD*FG loop is used when data is available from the utility in conjunction with the historical usage data. Further,
 - The PTD*FG is sent when there is no historical usage available if the utility has any of these data available for the ESCO.
 - For utilities that employ a comprehensive block, the PTD*FG loop will not be sent when the customer has put an account block in place
 - For utilities that employ a dual (historical usage and enrollment) block in place, when the customer has put a historical usage block in place.
- Page 68 of the IG Draft will be deleted because the 814 HU Response will address this issue.
- For page 70 of the IG Draft, the note will be modified to say “Required for Electric only, if available in the utility’s system”.
- For page 71 of the IG Draft, the BWG Chair will provide expanded language for the note to the TWG Chair to further explain the conditionality.

The 814 Historical Response Workpaper was reviewed verify that customer block information, if present for an account, would be communicated pre-enrollment under both utility block configurations. The modifications to the existing REF*7G segment permit multiple status codes to be sent to the receiving party. Based upon the information response, the ESCO may decide to contact the customer to get the block removed and then resubmit an 814 HU request, if necessary. The following design decisions were reached:

- For utilities that employ a comprehensive block, the same CAB code would be sent to indicate that the account is blocked; the 867 HU will not be sent nor will enrollment be permitted.
- For utilities that employ two level blocks:
 - If the customer has a historical usage block in place, an 867 HU will not be sent and the 814 Response will include the code HUR.
 - If the customer has an enrollment block in place but no historical usage block, an 867 HU will be sent and the 814 Response will include the code CAB which in this case, will indicate the presence of an enrollment block only.
 - If the customer has both an enrollment block and a historical usage block in place, an 867 HU will not be sent and the 814 Response will include both codes; CAB and HUR.

The 814 Change Request and Enrollment Response Workpapers were discussed together. The workpapers included modifications showing how the new non-usage items would be requested/provided a post-enrollment basis. The following design considerations were highlighted:

- The ICAP Tag would be provided in the AMT Monetary Amount (KZ=Peak Load Contribution) segment which is essentially an evolution of the existing AMT Monetary Amount (Electric Capacity Assignment) segment.
 - The DTM Date/Time Reference (Assigned Service Start Date) within the NY 814 Enrollment Response will not apply to the new non-usage items.

- The DTM Date/Time Reference (Effective Date of Change) within the NY 814 Change (Account Maintenance) will be used to indicate future ICAP Tags, to the extent they are available, and to the effective dates of changes to the new non-usage items, as applicable.

Task Assignments

The TWG Chair will make changes to the workpapers based upon feedback received during the meeting. With regard to Utility Maintained EDI Guides, the BWG Chair asked utility attendees to locate the references to their companies within the EDI Standards documents, determine whether they were still applicable. The general plan is to remove the notes from the EDI Standards documents and relocate them to the Utility Maintained EDI Guides as the Working Group prepared the modifications. Eventually all notes should be removed but for now, the priority should be on the 867 and 814 transaction guides and documents.

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 on the NYSEKDA item. It was noted that the Net Metering item should actually be called Net Metering Indicator.

Establish date/time for next meeting

The next meeting will be a combined BWG/TWG meeting on 8/22/14 at 10 A.M. The primary focus will be technical development, as appropriate, for the Phase I items.

Attendees

Zeno Barnum – Hudson Energy	Jeff Begley – Fluent Energy
Mary Do – Latitude Technologies	Tom Dougherty – ISTA
Jennifer Lorenzini – Central Hudson	Carol Teixeira – National Grid
Joe Falcon – Ambit Energy	Jean Pauyo – Orange & Rockland
Mary Ann Allen – Integrys	Jackie Hernandez – Con Edison
Donna Satcher-Jackson – National Grid	Gary Lawrence – Energy Services Group
Janet Manfredi – Central Hudson	Rock Carbone - Agway Energy Services
Mike Novak – National Fuel Gas	Charlie Trick – NYSEG/RG&E
Rick Tra – National Grid	Debbie Vincent – UGI Energy Services