

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

Administration

- Review/Modify Agenda: The Draft Agenda was adopted without modification.
- The Draft Minutes from the 11/14/2014 EDI Business Working Group (BWG)/Technical Working Group (TWG) meeting (“11/14 Meeting”) were adopted as Final with modifications to an attribution and the attendance list.
- DPS – no remarks.

Review/Follow-up – October 23 Report filing

No comments have been filed; we are waiting on Commission to take the next steps and there is a possibility of Commission action in the next couple of sessions.

Modifications to PSC EDI Web pages

With a pending change in personnel at DPS, there is no formal workpaper to present at this time however the intention to reorganize the EDI web pages into a format whereby all related web pages could be accessed from common navigation mechanism located on each EDI web page remains. In the mean time, identification of content/editing of the text can proceed. A workpaper should be available for the next working group meeting.

Modifications to Testing Procedures

Charlie Trick reviewed a workpaper describing some of the streamlined Phase III testing procedures NYSEG/RG&E has employed since 2011. Their experience has been positive and supports general efforts to streamline. Mr. Trick cautions that testing should not become so streamlined that it becomes essentially a connectivity test. Testing of certain key or core transactions to ensure that ‘behind the scenes’ tables are being updated was seen as important. If set up properly, testing could be completed in no more than a couple days yet adequately test the ESCO’s EDI capabilities.

The BWG Chair reviewed the discussion from the 11/14 Meeting with John D’Aloia (DPS Staff) who has been responsible for Phase I Testing. Given the maturity of EDI within New York’s retail market, Mr. D’Aloia was supportive of the general direction to streamline both Phase I and Phase III testing.

Based upon the discussion at the 11/14 Meeting as well as the discussion with Mr. D’Alia, the BWG Chair proposed that Phase I testing be retained but such testing would be infrequent, i.e. conducted on an as-needed basis. An alternative discussed at the 11/14 Meeting of having Phase I testing rolled into Phase III testing (and conducted by utilities as is done in some other states) potentially resulted in unnecessary testing. Additionally, administrative procedures used by DPS to certify that ESCOs were ready to enroll customers, etc., depended upon a demonstration of EDI readiness. Full elimination of Phase I testing could lead to the unintended consequence of UBP changes. Further, a certification of ESCO EDI readiness is valuable to utilities as independent means of determining when an ESCO is capable of Phase III testing. Finally, Phase I testing is still appropriate for ESCOs that develop in-house EDI capabilities and/or new (to New York) EDI Service Providers.

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Based upon discussion, the following was proposed as guidelines principles for streamlining EDI testing.

Phase I

- Would be renamed “Baseline Syntax Certification”
- In lieu of a test, EDI Service Providers could send correspondence to DPS certify that their ESCO clients were capable of meeting the testing requirements, e.g. generating syntax and basic connectivity.
- Portions of the current Phase I testing procedures that do not prove that the ESCO is capable of generating syntax, i.e. those that are currently are “cut & paste” oriented, will be eliminated.

Phase III

- Would be renamed “Pre-Production Readiness Testing”
- Current testing requirements would be viewed as individual components and utilities, based upon input from the ESCO’s EDI Service Provider, would determine which components should be tested.
- EDI Service Providers could seek to have their ESCO clients tested as a batch. ESCO batches could be sub-divided as follows:
 - Based upon transactional similarity, i.e. those that elect a particular billing model provided by the utility.
 - As requested by the EDI Service Provider, e.g. if the provider believed one of its ESCO clients would benefit from more rigorous testing.

The BWG Chair said that he would review the developments from today’s meeting with Mr. D’Aloia and LuAnn Scherer to determine if there was any objection to proceeding in this direction.

Following up from the on an item from the last meeting, the BWG Chair noted he received the official SEF files for the current EDI standards from Mr. D’Aloia and had forwarded them via email to those who had previously expressed an interest. Others who want copies should send an email to the BWG chair.

After some discussion, it was determined that since most of the changes made during the current round of development were to the 867HU transaction which is an outbound transaction. It is possible that the current SEF files were still appropriate. Further, some utilities do not use the SEF files as a part of their Phase III testing. Those that use the SEF files have the option of updating them for their utility-specific implementations. Use of utility-specific SEF files should be noted in Utility Maintained EDI Guides.

Those who receive the SEF files were asked to test the proposition that no general updates were necessary and report back to the working group if this proved false. To the extent SEF files do need to be updated, updates could be made during the proposed six-month period for back-office systems development. Under that timeline, the files would be ready for Utility-ESCO testing of the changes form the October 23 Report. Finally, it was noted that the SEF files would still be needed for Phase I testing.

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Establish date/time for next meeting

The next meeting will be a combined BWG/TWG meeting on Friday 1/2/2015 at 10 AM. Likely topics will include addressing Regulatory Update pertaining to EDI matters (if any), revisions to EDI Testing procedures and proposed changes to the Commission’s EDI web site.

Attendees

MaryAnn Allen - Integrys	Jeff Begley – Fluent Energy
Deborah Croce – EC Infosystems	Mary Do – Latitude Technologies
Tom Dougherty – Aurea Energy Services	Joe Falcon - Ambit
Gio Formato – Con Edison	Barbara Goubeaud – EC Infosystems
Jason Gullo – National Fuel Resources	Christine Hughey - Constellation
Gary Lawrence – Energy Services Group	Jennifer Lorenzini – Central Hudson
Janet Manfredi – Central Hudson	Kristen McFarland – IGS Energy
Veronica Munoz - Accenture	Mike Novak – National Fuel Gas
Jean Pauyo – O&R	Debbie Rabago - Ambit
Donna Satcher-Jackson – National Grid	Jim Stauble - Accenture
Jay Sauta - Agway	Sergio Smilley – National Grid
Robin Taylor – DPS Staff	Charlie Trick – NYSEG, RG&E
Debbie Vincent – UGI Energy Services	Kim Wall – PPL Solutions
Marc Webster – NYSEG, RG&E	