

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	Notes / Comments / Follow Up's	Next Action	Status	Responsible Party	Start	Finish
<b>Priority I</b>	<b>Enrollment Rejection Codes:</b> When a utility rejects an EDI enrollment, the utility provides a reason code.	814 HU Response OR 503 X (new trans)		Determine which transaction will be used.				
	<b>ICAP Tag:</b> A specific prospective customer's Installed Capacity (ICAP) tag, which indicates the customer's peak electricity demand.	867 HU OR 503 X (new trans)		Determine which transaction will be used.				
	<b>Meter Numbers:</b> Customer's number of meters and meter numbers.	867 HU	This data is already required and exists in the 867 HU.	None				
	<b>Number of Meters:</b> Customer's number of meters and meter numbers.	867 HU	This data is already required and exists in the 867 HU.	All utilities will verify if the number of meters is provided in the current 867 HU as required.		Everyone		
	<b>Account Settlement Indicator:</b> Whether the customer's account is settled with the ISO utilizing an actual 'hourly' or a 'class shape' methodology.	867 HU OR 503 X (new trans)	Determine if this data can be given via email request when an 814 HU request is rejected for "no usage".	Utilities to verify the volume of "no usage" 814 rejection transactions.		Everyone		
	<b>NYPA / Recharge NY Indicator:</b> Whether the customer receives any special incentives from the New York Power Authority.	* 814 HU Response OR 503 X (new trans)	* Determine if this data can be provided outside of EDI since we have determined that there is a list that is made available to ESCOs.	Discuss with Staff.		Mike		
	<b>Utility Discount Indicator:</b> Whether the customer receives any special delivery or commodity "first through the meter" incentives.	814 HU Response OR 503 X (new trans)						
	<b>Industrial Classification Code:</b> The customer's Standard Industrial Classification (SIC) code.	** 814 HU Response OR 503 X (new trans)	** We need to understand how this information is going to be used to determine if it is a pre-enrollment item.	Discuss with ESCOs.		Mike Novak		
	<b>Tax Exempt:</b> Whether the utility identifies the customer as tax exempt.	814 HU Response OR 503 X (new trans)						

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		Determine EDI Transaction	Notes / Comments / Follow Up's	Next Action	Status	Responsible Party	Start	Finish
	<b>Customer Supply Status:</b> Whether the customer is served by utility or another ESCO.	814 HU Response  OR 503 X (new trans)						
Priority I a	<b>Energy-related value-added service indicator:</b> 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.  More discussion is required.					
	<b>Low Income Status:</b> Provide a field for information on the customer's low income program enrollment status.	814 HU Response  OR 503 X (new trans)	Customer privacy policies need to be developed.  More discussion is required.					
	<b>ESCO Credit:</b> Provide any required refund as a credit on the customer's bill.	*** 810 (Bill Ready)	*** EDI Optional - For Bill Ready Utilities, ESCO could send similar to other credits. For Rate Ready Utilities, this would require new functionality to receive information in addition to the rate.	Develop a strategy to accommodate the ESCO credit to a customer outside of EDI.		CE.		
Priority II	<b>Full Service Bill Comparison:</b> 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.	**** 503 "New"	**** EDI Optional  The Utilities need to understand how the ESCOs will use this information and how often they will require it.	Meet with ESCOs to determine how this will be used.		Mike		
Priority III	<b>NYSERDA</b> Inquiry from the Governor's Office about the provision of data to NYSERDA via EDI.	867 HU	Need to review further to understand NYSERDA requirements.  <b>We should understand the urgency with this request to ensure that it does not interfere with our ability to meet our obligations by October.</b>	Discuss with LuAnn.  Request a meeting with NYSERDA.	Utilities would like an official document .e.g. an official PSC letter or Order addressing what NYSERDA.	Mike		
	<b>Net Metering</b> EDI modifications T.B.D.							