

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	Enrollment rejection codes are already provided in an 814 HU response.	None	Closed			
	<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)	Will have to consider adding to the 814 Change transaction.		Open			
	<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.	Verify if this field is required or optional.	Open			
	<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.	Verify if this field is required or optional.	Open			
	<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)  OR  814 HU Response	If this field is provided in the 814 HU response, manual responses will not be required when an 867 HU request is rejected for "no usage".	Determine which transaction will be used.	Open			
	<b>NYP&amp;A / Recharge NY Indicator:</b>  Whether the customer receives any special incentives from the New York Power Authority.	814 HU Response  OR  Utility Website	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.	Determine which transaction will be used.	Open			
	<b>Utility Discount Indicator:</b>  Whether the customer receives any special delivery or commodity "first through the meter" incentives.	814 HU Response  OR  867 HU  OR  503 X (new trans)	Does it apply to discounts on delivery or commodity.  Is it assumed that it is applicable to non-residential customers only.	Understand the specifics of this indicator. The discount programs need to be defined to understand how to provide this information.	Open			
	<b>Industrial Classification Code:</b>  The customer's Standard Industrial Classification (SIC) code.	814 HU Response  OR  503 X (new trans)		Determine which transaction will be used.	Open			

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	<b>Tax Exempt:</b> Whether the utility identifies the customer as tax exempt.	814 HU Response OR 867 HU OR 503 X (new trans)	Will have to consider adding to the 814 Change transaction.	Determine which transaction will be used.	Open			
	<b>Customer Supply Status:</b> Whether the customer is served by utility or another ESCO.	814 HU Response OR 867 HU OR 503 X (new trans)		Determine which transaction will be used.	Open			
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.		Pending			
	<b>Low Income Status:</b> Provide a field for information on the customer's low income program enrollment status.		Customer privacy policies need to be developed. More discussion is required.		Pending			
	<b>ESCO Credit:</b> Provide any required refund as a credit on the customer's bill.		EDI Optional	Need to understand how other Rate Ready utilities are going to plan for this.	Pending			
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.		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.	Pending			
Priority III	<b>NYSERDA</b> Inquiry from the Governor's Office about the provision of data to NYSERDA via EDI.	867 HU	Utilities would like to receive an official document. An official PSC letter or Order addressing what NYSERDA.		N/A			
	<b>Net Metering</b> EDI modifications T.B.D.		Minimally, would addition of a Net Metering Indicator be helpful?		N/A			

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