

TWG/BWG Workpaper – 6/27/2014
Interaction of Existing Customer Blocks with EDI Changes

Based upon Working Group development to date, we are revising the EDI Standards to provide for the following customer attributes:

- Installed Capacity (ICAP) tag
- Number of Meters
- Account Settlement Indicator
- NYPA/Recharge NY Indicator
- Utility Discount Indicator
- Utility Tax Exempt Status
- Industrial Classification Code
- Customer Supply Status

While no final decisions have been made, an operating presumption has been that the 867HU will be modified.

Issue: There has been some question about whether these items would not be available to the ESCO pre-enrollment when a customer has a block in place. The answer is possibly more straight-forward for utilities that employ a comprehensive block where if data was not provided, it could be provided if the customer removes the block.

For utilities that use two-level blocks, the HU block definition is commonly understood to block access to historical usage data. Several of the items above are not usage related (the ICAP tag is the exception). This raises the following questions:

- Should the HU Block definition be broader to cover all items in the EDI transaction?
- Other than ICAP tag, do items that describe attributes of the customer's service belong in the 867 HU transaction?
 - If not, where do they belong?
- Is an outcome that would provide non-usage items when an HU block is in place a legitimate EDI solution?
- Wherever these items end up, does the end result achieve a reasonable balance between legitimate ESCO business needs and customer privacy/preference concerns?