EDI Testing Qualification Checklist for ESCOs

To sign up for EDI testing, ESCOs must provide below documentation more than 30 days prior to the start date of the next EDI test batch noted on our websites.

- EDI Test Application*
  - ESCOs planning to serve CCA customers need to complete the CCA EDI Test application.

- Data Security Agreement* (complete one agreement per Utility)

- Operating Agreement* (complete one agreement per Utility)

- Billing Services Agreement*: ESCOs testing single bill (complete one agreement per Utility)

- Designation of Agency Agreement: ESCOs designating Agent on their behalf (complete one agreement per Utility)

- Designation Agent for Service Process Agreement*: ESCOs not located in New York need to complete agreement (complete one agreement per Utility)

- Business Classification Form*

- NYS Public Service Commission Certification letter

- NYISO Acceptance Letter (Electric ESCOs only)

- EDI Phase 1 certified: Listed on PSC website or provide PSC Phase 1 certification letter.

- W-9

Once all documentation has been received you will be signed up for the next available EDI test batch 30 days out.

*Documents found on website(s):
 www.rge.com or www.nyseg.com
 Click Our Community
 Click Suppliers & Partners
 Click Electronic Data Interchange (EDI)
 Click How to become and Electricity ESCO or How to become a Natural Gas ESCO
 Click on Forms link to get to documents.