EDI Testing Qualification Checklist for ESCOs

An ESCO applying to EDI test at NYSEG and/or RG&E territory must:

1. Be approved by New York State Department of Public Service as an Energy Service Company.
   Retail Access Application - General Information | Department of Public Service

2. Meet NYS Department of Public Service Commission electronic data interchange (EDI) phase 1 certification for Utility Bill Ready (UBR) transactions.

3. Electric ESCOs must be registered with the New York Independent System Operator (NYISO)
   New York State Independent System Operator (NYISO)

4. Complete/provide below Documentation list to supplier_relations@rge.com.

Documentation	
EDI Test Application	ESCO serving non-CCA customers only.
CCA ESCO EDI Test Application	ESCO working with a CCA to serve CCA customers only.
Data Security Agreement (DSA)	ESCO to serve non-CCA customers. Complete one per Utility.
CCA Data Security Agreement (DSA)	ESCO working with a CCA to serve CCA customers only.
CCA Data Security Agreement Self Attestation	ESCO working with a CCA to serve CCA customers only.
Operating Agreement (OA)	Complete one OA per Utility.
Billing Services Agreement (BSA)	Complete one BSA per Utility.
Designation of Agency Agreement	If you're designating an Agent on your behalf; complete one Designation of Agency Agreement per Utility.
Designation of Agent for Service Process Agreement	If you are not located within NYS, you must designate an Agent within NYS on your behalf. Complete one Designation of Agent for Service Process Agreement per Utility.
Business Classification Form	Complete
W9	Provide
DPS Approval letter	Provide

NYSEG and RG&E Document links page (Links take you to same Utility page):
   Forms and Agreements - Electric - NYSEG
   Forms and Agreements - Natural Gas - NYSEG
   Forms and Agreements – Electric - RGE
   Forms And Agreements – Natural Gas - RGE

5. Once documentation received and approved, the ESCO will be signed up for EDI testing in next available test batch 30 days out per EDI test schedules. EDI - NYSEG; EDI - RGE