

EDI Testing Qualification Checklist for ESCOs

A company applying for authorization to become an energy service company (ESCO) in 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
 - a. Provide your NYS Department of Public Service Commission ESCO approval letter.
2. Meet NYS Department of Public Service Commission electronic data interchange (EDI) phase 1 certification for core and (if applicable) single bill utility bill ready (UBR) transactions.
 - a. Phase 1 utility bill ready approval confirmed on PSC approval letter or ESCO listed on DPS EDI Phase 1 Certification List. [edi-certified-status-list.xlsx](#)
3. Electric ESCOs must be registered with the New York Independent System Operator (NYISO)
New York State Independent System Operator (NYISO)
4. Complete below list of Forms and Agreements and email, along with your W9, to supplier_relations@rge.com.
 - 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 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](#)

Forms and Agreements (links noted above)	
EDI Test Application	ESCOs complete one EDI Test Application
CCA ESCO EDI Test Application	ESCOs to serve CCA Customer only
Data Security Agreement (DSA)	Complete one DSA per Utility.
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 one Business Classification
W9	Provide your company W9