

• To get started, please contact

• [EDISupport@pge.com](mailto:EDISupport@pge.com)



## 814 Checklist for Direct Access Service Requests

*Following is a list of step by step instructions that are to be used by Energy Service Providers (ESPs)*

*who want to be approved by PG&E to become eligible to use Electronic Data Interchange (EDI)*

*814.*

---

Electronic Data Interchange (EDI) 814 Direct Access Service Requests (DASRs) are utilized for enrollments, maintenance and updates for PG&E accounts that participate in Direct Access. PG&E policy is to accept EDI 814 data formats that comply with ANSI, X-12, UIG and California Market Participants Work Groups. .

ESP submitting EDI 814 DASR will need to complete EDI testing and certification before acceptance of any EDI 814 transactions in production.

The following will describe the EDI testing requirements and certification process for DASR. This process also requires the ability of the ESP to accept meter data in the EDI 867 meter usage formats, which includes both monthly and interval data.

- **High Level Steps** - A general overview of the testing requirements;
- **Detailed Steps** - More details instructions on each step of the testing.

Your primary contact person at PG&E as you move through the EDI 814 testing process will be:

*Barbara Lawrence @ (415) 973-6678*

*Email address: [BXS2@pge.com](mailto:BXS2@pge.com)*

*Alternate email address: [EDISupport@pge.com](mailto:EDISupport@pge.com)*



**Please allow a minimum of 10 business days to go through the EDI 814 testing process**

**High Level Steps:**

**A. Preparation for Testing**

<b>Step #</b>	<b>Description</b>	<b>Responsibility</b>
1	Download PG&E EDI 814 Implementation Guide and Tutorials from PG&E Web site. <a href="http://www.pge.com/edi">www.pge.com/edi</a>	ESP

**B. Testing & Approval**

<b>Step #</b>	<b>Description</b>	<b>Responsibility</b>
2	Contact PG&E to establish a test directory and password for accessing the PG&E server and to obtain your test account numbers.	ESP
3	Place the required EDI 814 connect test files on the PG&E server.	ESP
4	Notify PG&E that the files are on the PG&E server via e-mail. <a href="mailto:EDISupport@pge.com">EDISupport@pge.com</a>	ESP
4	Process the test files to verify that they comply with the requirements for accuracy of EDI data format and data content.	PG&E
5	Respond to the DASR with the appropriate (accepted/rejected) EDI 997 acknowledgment.	PG&E
6	Provide EDI 867 historical usage test to verify ESP can successfully retrieve and translate files.	PG&E
7	Once all required EDI 814 files have been accepted by PG&E and EDI 867 files successfully processed and posted, the ESP will be considered approved for EDI 814.	PG&E



## Detailed Steps:

### A. Preparation for Testing

Step #	Description	Details
1	Download PG&E EDI 814 Implementation Guide and Tutorials from PG&E Web site.	Both the Implementation guide and Tutorials can be downloaded from PG&E web site at: <a href="http://www.pge.com/customer_services/other/esp_proj/website/esp_hp/da_docs.html">www.pge.com/customer_services/other/esp_proj/website/esp_hp/da_docs.html</a> . The Implementation guide and tutorials will provide you with information needed to understand PG&E EDI 814 requirements.

### B. Testing & Approval

Step #	Description	Details
2	Establishing testing directory and password to access PG&E server.	Once you are ready to begin testing, PG&E will establish a test directory and password. PG&E will provide you 12 test accounts with all pertinent customer information and a test directory to place your test accounts. This test directory is located on MADS.PGE.COM. PG&E will retrieve these files from the test directory and process them.
3	Place EDI 814 test files on the PG&E server, and retrieve and EDI 867 test files.	Place the test files placed in test directory with the following naming convention: <b>TEST.ESPNAME.12345676890</b>  Your test files must include the following scenarios: <ul style="list-style-type: none"> <li>➤ a Connect Request for a new DA customer;</li> <li>➤ a Disconnect Request for an existing DA customer;</li> </ul> You are also required to retrieve two test files with 12 months of usage history from the PG&E server. These files will be an EDI 867 and contain the following data: 12 months of interval data;(electric only) 12 months of monthly data. Note: Sample documents are available in our tutorials.
4	Additional Test Scenarios	Listed below are additional scenarios that can be tested to ensure you can successfully send and/or receive these records: an Update Request for MDMA;



<b>Step #</b>	<b>Description</b>	<b>Details</b>
		an Update Request for Billing Option; a Disconnect Request from pending ESP; an Account Maintenance Notification for a (meter number change); an Account Maintenance Notification for a (billing address change); an Account Maintenance Notification for (new PG&E account number); an Account Maintenance Disconnect for a (closed account).
5	Process the test files to verify that they comply with the requirements for accuracy of data format and content.	PG&E will process through our translator and acknowledged the files.

**Go to PG&E web site to review our guides and tutorials on line:**

[http://www.pge.com/customer\\_service/edi/](http://www.pge.com/customer_service/edi/)