

Case No. 12-M-0476 et. al.  
EDI Business/Technical Working Groups  
Additional Sales Tax Changes Workpaper – Tax Exemptions  
March 27, 2015

814C Modification:

NY 814 Change (Account Maintenance)

Segment: **AMT** Monetary Amount (Tax Exemption Percent)  
Position: 060  
Loop: LIN Optional (Must Use)  
Level: Detail  
Usage: Optional (Dependent)  
Max Use: 1  
Purpose: To indicate the total monetary amount  
Syntax Notes:  
Semantic Notes:  
Notes:

ESCO Request: Conditional  
Utility Request: Not Used  
Responses: Not Used

This segment must be sent by the ESCO when there is a change in the tax exemption status of the account and the Utility is the bill calculator, unless in its Utility Maintained EDI Guide a utility provides another means to implement the customer's sales tax exemption.

This segment is not applicable to the Single Retailer Model.

AMT~DP~1  
AMT~DP~75

Data Element Summary

	Ref.	Data		Attributes
	Des.	Element	Name	
<del>Mand.</del>	AMT01	522	Amount Qualifier Code	M ID 1/3
			DP	Exemption
				Tax Exempt Percent: This code is used when some or all of the ESCO's service is exempt from state sales tax. See AMT02 for valid values.
<del>Mand.</del>	AMT02	782	Monetary Amount	M R 1/18
				For percentage values, the whole number "1" represents 100 percent or the ESCO service is fully tax exempt from state sales taxes. Decimal numbers less than "1" represent percentages; "0" indicates the account is NOT exempt from state sales taxes.

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814E Modification:

NY 814 Enrollment Request & Response

**Segment:** **AMT** Monetary Amount (Tax Exemption Percent)  
**Position:** 060  
**Loop:** LIN Optional (Must Use)  
**Level:** Detail  
**Usage:** Optional (Dependent)  
**Max Use:** 1  
**Purpose:** To indicate the total monetary amount  
**Syntax Notes:**  
**Semantic Notes:**  
**Notes:**

Enrollment Requests: Conditional.  
Other Requests/Responses: Not Used

This segment is used to indicate that the ESCOs service is exempt from tax. A tax exemption certificate must be obtained from the customer and retained by the ESCO to support this designation. Unless a utility provides another means to implement the customer's sales tax exemption in its Utility Maintained EDI Guide, This segment must be sent on an Enrollment Request when (1) the billing option is Utility Rate Ready consolidated billing and the ESCOs service is tax exempt. This segment is not applicable to the Single Retailer Model.

AMT~DP~1

**Data Element Summary**

	Ref.	Data			Attributes
	<u>Des.</u>	<u>Element</u>	<u>Name</u>		
<del>Mand.</del>	AMT01	522	Amount Qualifier Code		M ID 1/3
			DP	Exemption	
				Tax Exempt Percent: This code is used when the ESCOs service is exempt from tax. See AMT02 for valid values.	
<del>Mand.</del>	AMT02	782	Monetary Amount		M R 1/18
				For percentage values, the whole number "1" will represent 100 percent; decimal numbers less than "1" represent percentages.	