814 - Change Request

Segment: **REF** Reference Identification (Reason for Change – Account Level)

Position:	030
Loop:	LIN
Level:	Detail
Usage:	Optional
Max Use:	>1
Purpose:	To specify identifying information
Syntax Notes:	1 At least one of REF02 or REF03 is required.
	2 If either C04003 or C04004 is present, then the other is required.
	3 If either C04005 or C04006 is present, then the other is required.
Semantic Notes:	1 REF04 contains data relating to the value cited in REF02.
Comments:	
Notes:	Request: Conditional
	Response: Optional
Example:	REF*TD*AMTKZ

Data Element Summary

	Ref. Des.	Data Element	Name	Attributes
Must Use	**REF01**	**128**	**Reference Identification Qualifier**	**M ID 2/3**

Code qualifying the Reference Identification

 TD Reason for Change

	Ref. Des.	Data Element	Name	Attributes
Must Use	**REF02**	**127**	**Reference Identification**	**X AN 1/30**

Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier

AMTKZ	Change Peak Load Capacity (already available today in NY)
REF5E	Change Low Income Status
REFIJ	Change Industrial Classification Code
REFSG	Change Utility Discount Indicator
REFTDT	Change Account Settlement Indicator
REFTX	Change Tax Exempt
REFYP	Change NYPA/Recharge NY Indicator

Segment:	AMT Monetary Amount (KZ=Peak Load Contribution
Position:	060
Loop:	LIN
Level:	Detail
Usage:	Optional
Max Use:	>1
Purpose:	To indicate the total monetary amount
Syntax Notes:	
Semantic Notes:	
Comments:	
Notes:	Utility to ESCO Request: Conditional for Electric Accounts Response: Not Required ESCO to Utility Request: Not Used Response: Not Used AMT*KZ*123

Data Element Summary

Ref. Des.	Data Element	Name	X12 Attributes
AMT01	522	**Amount Qualifier Code**	M ID 1/3
		Code to qualify amount	
		KZ Obligated	
		Peak Load Contribution (a.k.a. Load Responsibility or PLC)	
		A specific prospective customer's Installed Capacity (ICAP) Tag, which indicates the customer's peak electricity demand.	
AMT02	782	**Monetary Amount**	M R 1/18
		Monetary amount	
		Peak Load Contribution	

Segment:	**REF** Reference Identification (Industrial Classification Code)
Position:	030
Loop:	LIN Mandatory
Level:	Detail
Usage:	Optional
Max Use:	20
Purpose:	To specify identifying information
Syntax Notes:	1 At least one of REF02 or REF03 is required.
	2 If either C04003 or C04004 is present, then the other is required.
	3 If either C04005 or C04006 is present, then the other is required.
Semantic Notes:	1 REF04 contains data relating to the value cited in REF02.
Comments:	
Notes:	Utility to ESCO Request: Conditional
	Response: Not Required
	ESCO to Utility Request: Not Used
	Response: Optional
	REF*IJ*1234*SIC

Data Element Summary

Ref. Des.	Data Element	Name	Attributes
REF01	**128**	**Reference Identification Qualifier**	**M ID 2/3**
		Code qualifying the Reference Identification	
		The customer's Standard Industrial Classification (SIC) Code	
		IJ SIC Code	
REF02	**127**	**Reference Identification**	**X AN 1/30**
		Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier	
REF03	352	Description	**X AN 1/80**
		SIC – Value contained in REF02 is a SIC Code	
		NAISC – Value contained in REF02 is a NAISC code	

Segment:	**REF** Reference Identification (Utility Discount Indicator)		
Position:	030		
Loop:	LIN	Mandatory	
Level:	Detail		
Usage:	Optional		
Max Use:	20		
Purpose:	To specify identifying information		
Syntax Notes:	1	At least one of REF02 or REF03 is required.	
	2	If either C04003 or C04004 is present, then the other is required.	
	3	If either C04005 or C04006 is present, then the other is required.	
Semantic Notes:	1	REF04 contains data relating to the value cited in REF02.	
Comments:			
Notes:	Utility to ESCO Request: Conditional		
	Response: Not Required		
	ESCO to Utility Request: Not Used		
	Response: Optional		
	REF*SG*N		

Data Element Summary

Ref. Des.	Data Element	Name	Attributes
REF01	**128**	**Reference Identification Qualifier**	**M ID 2/3**
		Code qualifying the Reference Identification	
		The customer receives any special delivery or commodity "first through the meter" incentives.	
		SG Utility Discount Indicator	
REF02	**127**	**Reference Identification**	**X AN 1/30**
		Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier	
		N No, utility discount or incentive	
		Y Yes, is receiving a utility discount or incentive	

Segment:	**REF** Reference Identification (Account Settlement Indicator)	
Position:	030	
Loop:	LIN Mandatory	
Level:	Detail	
Usage:	Optional	
Max Use:	20	
Purpose:	To specify identifying information	
Syntax Notes:	1 At least one of REF02 or REF03 is required.	
	2 If either C04003 or C04004 is present, then the other is required.	
	3 If either C04005 or C04006 is present, then the other is required.	
Semantic Notes:	1 REF04 contains data relating to the value cited in REF02.	
Comments:		
Notes:	Utility to ESCO Request: Conditional	
	Response: Not Required	
	ESCO to Utility Request: Not Used	
	Response: Optional	
	REF*TDT*C	

Data Element Summary

Ref. Des.	Data Element	Name	Attributes
REF01	**128**	**Reference Identification Qualifier**	**M ID 2/3**
		Code qualifying the Reference Identification	
		The customer's account is settled with the ISO utilizing an actual "hourly" or a "class shape" methodology.	
		TDT Account Settlement	
REF02	**127**	**Reference Identification**	**X AN 1/30**
		Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier	
		C Class Load Shape	
		I Interval	
		M Mixed	

Segment:	**REF** Reference Identification (NYPA/Recharge New York)	
Position:	030	
Loop:	LIN Mandatory	
Level:	Detail	
Usage:	Optional	
Max Use:	20	
Purpose:	To specify identifying information	
Syntax Notes:	1 At least one of REF02 or REF03 is required.	
	2 If either C04003 or C04004 is present, then the other is required.	
	3 If either C04005 or C04006 is present, then the other is required.	
Semantic Notes:	1 REF04 contains data relating to the value cited in REF02.	
Comments:		
Notes:	Utility to ESCO Request: Conditional	

Response: Not Required

ESCO to Utility Request: Not Used
Response: Optional

REF*YP*N

Data Element Summary

Ref. Des.	Data Element	Name		Attributes
REF01	128	**Reference Identification Qualifier**	M	ID 2/3

Code qualifying the Reference Identification

The customer receives any special incentives from the New York Power Authority.

	YP	NYPA/Recharge Indicator

Ref. Des.	Data Element	Name		Attributes
REF02	127	**Reference Identification**	X	AN 1/30

Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier

	N	No, the customer does not participate in NYPA/Recharge New York
	Y	Yes, the customer participates in NYPA/Recharge New York

Segment: **NM1** Individual or Organizational Name

Position:	080
Loop:	NM1
Level:	Detail
Usage:	Optional
Max Use:	1
Purpose:	To supply the full name of an individual or organizational entity
Syntax Notes:	**1** If either NM108 or NM109 is present, then the other is required.
	2 If NM111 is present, then NM110 is required.
Semantic Notes:	**1** NM102 qualifies NM103.
Comments:	**1** NM110 and NM111 further define the type of entity in NM101.

Notes:	This loop is used to convey meter level information. NM1 loops may be sent in any order
PA Use:	Please see the rules for the use of this Loop on the Notes page.
	Utility to ESCO Request: Required if changing meter level information Response: Optional Utility to ESCO Request: Required if changing meter level information Response: Optional
NJ Use:	Same as PA
DE Use:	Same as PA
MD Use:	Same as PA
Examples:	NM1*MR*3*****32*1234568MG NM1*MA*3*****32*UNMETERED NM1*MQ*3*****32*ALL NM1*MX*3*****32*334545R

Data Element Summary

	Ref. Des.	Data Element	Name	Attributes
Must Use	**NM101**	**98**	**Entity Identifier Code**	**M ID 2/3**

Code identifying an organizational entity, a physical location, property or an individual

	MA	Party for whom item is ultimately intended
		Indicates a Meter Addition. Used when an additional meter is added to a multi-metered account or unmetered account or, when a new meter is added to an active account whose old meter had been recently removed (see the MR code).
	MQ	Meter Location

Indicates that this NM1 loop contains a change to delivery point or meter related information unrelated to a meter addition, removal, or exchange. Used when a meter service attribute is changed or when erroneous meter numbers are corrected (for corrections, the NM1*MQ is used in conjunction with the REF*46 segment, which is used to send the incorrect meter number).

MR	Medical Insurance Carrier

Indicates a Meter Removal. This code is used when: one or more meters are removed from a multi-metered account; an account with a single meter is changed to UNMETERED or; a meter has been removed temporarily but the account remains active and another meter is added.

MX	Juvenile Witness

Indicates a Meter Exchange. This code value in this segment will be used in conjunction with a REF*46 segment, which will contain the old meter number, when there has been a meter exchange. This would include instances in which a meter is added to a previously un-metered account.

Must Use **NM102** **1065** **Entity Type Qualifier** **M ID 1/1**

Code qualifying the type of entity

3	Unknown

Must Use **NM108** **66** **Identification Code Qualifier** **X ID 1/2**

32	Assigned by Property Operator

Use when NM109 contains a meter number.

93	Code assigned by organization originating the transaction set

Use when NM109 is not a meter number.

Must Use **NM109** **67** **Identification Code** **X AN 2/80**

Code identifying a party or other code

 NM108 = 32: NM109 will contain the Utility meter number (in conformance with the conditions described above).

If NM108 = 93: NM109 will contain the literal "UNMETERED" (for unmetered accounts) OR the literal "ALL" (used when changes apply to all meters in a multi-metered account).

Segment: **REF** Reference Identification (Reason for Change – Meter Level)

Position:	030
Loop:	LIN
Level:	Detail
Usage:	Optional
Max Use:	>1
Purpose:	To specify identifying information
Syntax Notes:	1　At least one of REF02 or REF03 is required.
	2　If either C04003 or C04004 is present, then the other is required.
	3　If either C04005 or C04006 is present, then the other is required.
Semantic Notes:	1　REF04 contains data relating to the value cited in REF02.
Comments:	
Notes:	Request: Conditional
	Response: Optional
	This segment is used to identify the data segment(s) sent at the account level that are being changed. See page 48 of this Implementation Guide for a description of the codes used to identify a change in the data segment(s) sent at the meter level.
Example:	REF*TD*NM1MQ

Data Element Summary

	Ref. Des.	Data Element	Name	Attributes	
Must Use	**REF01**	**128**	**Reference Identification Qualifier**	**M**	**ID 2/3**
			Code qualifying the Reference Identification		
			TD　　　　Reason for Change		
Must Use	**REF02**	**127**	**Reference Identification**	**X**	**AN 1/30**
			Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier		
			NM1MQ　　Change Metering Location (Change of Meter Number - currently already in NY EDI Spec)		

Segment: REF Reference Identification (Old Meter Number)

Position:	130
Loop:	NM1
Level:	Detail
Usage:	Optional
Max Use:	>1
Purpose:	To specify identifying information
Syntax Notes:	1 At least one of REF02 or REF03 is required.
	2 If either C04003 or C04004 is present, then the other is required.
	3 If either C04005 or C04006 is present, then the other is required.
Semantic Notes:	1 REF04 contains data relating to the value cited in REF02.
Comments:	

Notes	Utility Request: Conditional
	E/M Response: Not Used
	E/M Request: Not Used
	Utility Response: Not Applicable
	This segment is used when a meter exchange (MX) is being reported. In this situation, the new meter number is sent in the NM1 segment and the old meter number is sent in this REF segment. This segment is also used when a corrected meter number is being communicated.
Example:	REF*46*9938526S

Data Element Summary

Attributes	Ref. Des.	Data Element	Name	X12	
Must Use	**REF01**	**128**	**Reference Identification Qualifier**	M	ID 2/3
			Code qualifying the Reference Identification		
			46 Old Meter Number		
Must Use	**REF02**	**127**	**Reference Identification**	X	AN 1/30
			Old Meter Number		