Case No. 12-M-0476 et. al.
EDI Business/Technical Working Groups
Workpaper –814C/814E IG – Proposed REF*TD Change - 4/1/2016

From: Gary Lawrence
Sent: Friday, March 18, 2016 9:54 AM
To: Mary; 'Thomas Dougherty'; Wall, Kimberly A; 'Barbara Goubeaud'; Mike Novak
Subject: 814E and 814C PER IC Updates - Retire PERIC Code

Good Morning. With the updates to the 814E and the 814C PER segment and the addition of codes to send fax and/or email contact info I was wondering if now might be the time to retire the Reason for Change Code of PERIC (REF*TD*PERIC) and just use N18R and N1BT like other markets do (IL, OH and PJM). This would make validation easier (or at least it would for me) since you would know where the updated data would be (either in the N18R loop or in the N1BT loop). With the PERIC code the updated data could be present in either N1 loop and so it's a require one if the other is null situation. I wanted to see if anyone one else had any thoughts on this before I present it to the group on 4/1? Or if maybe there's a reason to continue using PERIC?

Thanks,
Gary.

Segment:	**REF Reference Identification (Reason for Change - Account Level)**
Position:	030
Loop:	LIN Optional (Must Use)
Level:	Detail
Usage:	Optional (Dependent)
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.
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.
	REF~TD~N18R

Data Element Summary

	Ref. Des.	Data Element	Name	Attributes
Mand.	REF01	128	**Reference Identification Qualifier**	M ID 2/3
			TD Reason for Change	
Must Use	REF02	127	**Reference Identification**	X AN 1/30
			AMT7 Change Assistance Program Participation Credit	
			Used to report a credit to the customer's account when the ESCO has charged an Assistance Program Participant more than what the customer would have paid the utility and the ESCO is required to provide a credit to the customer. The Utility will include this one-time credit on the customer's next bill.	
			AMT9M Change Customers' Tax Rate 1	
			Utility Rate Ready Consolidated Billing Only.	
			Used to report a change in the customer's tax rate when the utility is calculating ESCO charges.	
			The 9M code may also be used to report a change in the residential tax rate applicable to a portion of the service	

	(i.e. a REF*RP was present in the Enrollment transaction) when URR billing is in effect. The AMT9N code may be used to report a change in the portion of the account taxed at a commercial rate.
AMT9N	Change Customers' Tax Rate 2
	Utility Rate Ready Consolidated Billing Only. This code may only be used to report a change in the customer's tax rate applicable to the portion of the service taxed at a commercial rate in instances when part of the service is taxed at a residential rate and the balance at a commercial rate (i.e. REF*RP was present in the Enrollment transaction). The AMT9M code may be used to report a change in the residential tax rate on that account.
AMTB5	Change ESCO Budget Plan Installment Amount
	Supported only if indicated within a utility's Utility Maintained EDI Guide.
AMTBD	Change ESCO Budget Plan Balance
	Supported only if indicated within a utility's Utility Maintained EDI Guide.
AMTDP	Change Percentage of Service Tax Exempt
AMTFW	Change ESCO Fixed Charge
AMTKZ	Change ICAP
	ELECTRIC Service Only.
AMTRJ	Change ESCO Commodity Price
DTM007	Change Effective Date
DTM150	Change Service Period Start Date
	Enrollment is pending. This code is used by the Utility to report a change in the Assigned Service Start Date.
DTM151	Change Service Period End Date
Unrelated note was lost several revisions ago>>>>>>>>	A Drop is pending. This code is used by the Utility to report a change in the Assigned Service End Date.
N18R	Change Name or Service Address
	Use this code when the name on the account is being changed and/or a change of service address is being reported.
N1BT	Change Name for Mailing or Mailing Address
	Use this code when the name for mailing and/or the mailing address is being changed.
PERIC	Change Information Contact Information
	Use this code when reporting a change in the Customer's Telephone Number in an N1 (Customer) or N1 (Name for Mailing) Loop.
REF11	Change ESCO Customer Account Number
REF12	Change Utility Account Number
REF65	Change Meter Read Cycle
REFBF	Change Bill Cycle
REFBLT	Change Billing Type (Bill Presenter)
REFGC	Change Gas Capacity Assignment/Obligation
	GAS Service Only
REFIJ	Change Industrial Classification Code
REFLF	Change ESCO Late Fee Policy
	Supported only if indicated within a utility's Utility Maintained EDI Guide.

REFNR	Change Current Budget Billing Status
REFPC	Change Party that Calculates the Bill (Bill Calculator)
REFPGC	Change Partial Participation Portion
REFRP	Change Portion Taxed Residential
REFSG	Change Utility Discount Indicator
REFSPL	Change ISO LBMP Zone
	ELECTRIC Service Only
REFSU	Change Special Processing Code
	Use this code to report a change in the Customer's Life Support status (Single Retailer Model)
REFTDT	Change Account Settlement Indicator
REFTX	Change Utility Tax Exempt Status
REFVI	Change Gas Pool ID
	GAS Service Only
REFYP	Change NYPA Discount Indicator