

**Case No. 12-M-0476 et. al.**  
**EDI Business/Technical Working Groups**  
**Workpaper –814C – Proposed REF\*TD Change - 4/15/2016**

<b>Segment:</b>	<b>REF Reference Identification (Reason for Change - Account Level)</b>
<b>Position:</b>	030
<b>Loop:</b>	LIN Optional (Must Use)
<b>Level:</b>	Detail
<b>Usage:</b>	Optional (Dependent)
<b>Max Use:</b>	>1
<b>Purpose:</b>	To specify identifying information
<b>Syntax Notes:</b>	<b>1</b> At least one of REF02 or REF03 is required. <b>2</b> If either C04003 or C04004 is present, then the other is required. <b>3</b> If either C04005 or C04006 is present, then the other is required.
<b>Semantic Notes:</b>	<b>1</b> REF04 contains data relating to the value cited in REF02.
<b>Notes:</b>	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**

<b>Mand.</b>	<b>Ref. Des.</b>	<b>Data Element</b>	<b>Name</b>	<b>Attributes</b>
	<b>REF01</b>	<b>128</b>	<b>Reference Identification Qualifier</b>	<b>M ID 2/3</b>
			TD Reason for Change	
<b>Must Use</b>	<b>REF02</b>	<b>127</b>	<b>Reference Identification</b>	<b>X AN 1/30</b>
			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	

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Unrelated note was lost several revisions ago>>>>>>>