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

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

**Position:** 030

> Loop: LIN Optional (Must Use)

Level: Detail

Usage: Optional (Dependent)

Max Use:

**Purpose:** To specify identifying information

**Syntax Notes:** At least one of REF02 or REF03 is required.

> 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:** REF04 contains data relating to the value cited in REF02.

> Request: Conditional **Notes:** 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.	Data		•		
	Des.	<b>Element</b>	<u>Name</u>			<u>ibutes</u>
Mand.	REF01	128	Reference Identific	ation Qualifier	M	ID 2/3
			TD	Reason for Change		
Must Use	REF02	127	Reference Identific	ation	X	AN 1/30
			AMT7	Change Assistance Program Participatio		
				Used to report a credit to the customer's		
			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 of time credit on the customer's next bill.  AMT9M Change Customers' Tax Rate 1			
					iclude	this one-
					0.1	
				Utility Rate Ready Consolidated Billing		
		Used to report a change in the customer's tax rathe utility is calculating ESCO charges.  The 9M code may also be used to report a change in the customer's tax rather than 100 miles.		rate when		
				ingo in the		
			residential tax rate applicable to a port			
			(i.e. a REF*RP was present in the Enrollment			
			transaction) when URR billing is in effect			
				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 c		
				customer's tax rate applicable to the port		
				service taxed at a commercial rate in inst		
				part of the service is taxed at a residentia		
				balance at a commercial rate (i.e. REF*F		
				in the Enrollment transaction). The AM		•
				be used to report a change in the resident	nai ta	x rate on
			AMTD 5	that account.  Change ESCO Budget Plan Installment	A a	· m t
			AMTB5	Change ESCO Budget Plan Installment	Amou	HIL

Supported only if indicated within a utility's Utility

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	Maintained EDI Guide.
AMTBD	Change ESCO Budget Plan Balance
	Supported only if indicated within a utility's Utility
A LATTIC D	Maintained EDI Guide.
AMTDP	Change Percentage of Service Tax Exempt
AMTFW	Change ESCO Fixed Charge
AMTKZ	Change ICAP
A MATTO A	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
DTM151	to report a change in the Assigned Service Start Date.
	Change Service Period End Date
Unrelated note was lost several revisions ago>>>>	
N18R	report a change in the Assigned Service End Date.  Change Name or Service Address
NION	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
TAID1	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