Proposed Modification to 814C:

NY 814 Change (Account Maintenance)

Segment:	**REF** Reference Identification (Bill Calculator)
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:	Utility Request: Conditional
	ESCO Response: Not Used
	ESCO Request: Conditional
	Utility Response: Not Used

This segment is sent to report a change in the Bill Calculator. It may be necessary to send additional dependent data segments when requesting a change in either bill presenter (REF*BLT) or bill calculator. See Front Matter notes (pages i - iv) for further instructions.

~~Not used in Single Retailer transactions that support ESCO Combined Billing~~
REF~PC~DUAL
REF~PC~LDC

Data Element Summary

	Ref. Des.	Data Element	Name	Attributes
~~Mand.~~	REF01	128	Reference Identification Qualifier	M ID 2/3
			PC Production Code	
			Indicates this data segment identifies the party that will calculate billed charges.	
Must Use	REF02	127	Reference Identification	X AN 1/30
			DUAL Each Party Calculates its own charges.	
			"DUAL" SHOULD BE SENT WHEN:	
			The ESCO is the Bill Presenter (REF*BLT= ESP) AND the utility will send an 810 to the ESCO with bill ready utility charges fully calculated; OR	
			The Utility is the Bill Presenter (REF*BLT=LDC) AND the ESCO will send an 810 to the Utility with bill ready ESCO charges fully calculated; OR	
			Each Party will present their own bill (REF*BLT=DUAL) AND each will calculate their own charges.	
			LDC The Utility Calculates the ESCO Charges	
			RATE READY: The ESCO provides the rate or rate structure to the Utility. The Utility calculates the ESCO's portion of the bill.	
			ESP The ESCO Calculates the ESCO Charges	
			For ESCO Combined Billing Only; the ESCO is the bill presenter, the Utility calculates its charges and will send an 810SR to the ESCO.	

Proposed Modification to 814E:

NY 814 Enrollment Request & Response

Segment:	**REF** Reference Identification (Bill Calculator)	
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:	Enrollment Requests:	Required
	Enrollment Accept Responses:	Required
	Other Requests/Responses:	Not Used

This segment is used to identify which entity will calculate the billed charges that will appear on the customer's bill. This segment in conjunction with the REF*BLT segment is used to designate the customer's bill option.
The segment is required on Enrollment Requests and Enrollment Accept Response transactions.

REF~PC~DUAL
REF~PC~LDC

Data Element Summary

	Ref. Des.	Data Element	Name	Attributes
Mand.	REF01	128	Reference Identification Qualifier	M ID 2/3
			PC — Production Code	
			Indicates who will calculate billed charges.	
Must Use	REF02	127	Reference Identification	X AN 1/30
			DUAL — Each Party Calculates its own charges.	

DUAL applies when:
Each party presents their own bill (Used when REF*BLT segment contains DUAL) or the ESCO is a Single Retailer (Used when REF*BLT segment contains ESP), or the BILL READY method is used for consolidated billing, e.g. Utility sends an 810 transaction to the ESCO with bill ready utility charges fully calculated (Used when REF~BLT segment contains ESP) OR

ESCO sends an 810 transaction to the Utility with bill ready ESCO charges fully calculated (Used when REF~BLT segment contains LDC).

LDC — The Utility Calculates the ESCO Charges

RATE READY: The ESCO supplies a rate code or price to the Utility and the Utility calculates the ESCO's portion of the consolidated bill.

ESP — The ESCO Calculates the ESCO Charges

For ESCO Combined Billing Only; the ESCO is the bill presenter, the Utility calculates its charges and will send an 810SR to the ESCO.