

Case No. 12-M-0476 et al.  
 EDI Business/Technical Working Groups  
 Net Meter Indicator  
 4/26/2019

**New Segment:**

NY 814 Change (Account Maintenance)

**Segment:** **REF** **Reference Identification (Special Meter Configuration)**  
**Position:** 030  
**Loop:** LIN Optional (Must Use)  
**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.

**Notes:** Utility Request: Optional  
ESCO Response: Not Used  
  
ESCO Request: Not Used  
Utility Response: Not Used

If supported by a utility, as specified in its Utility Maintained EDI Guide, used to notify the ESCO that the account has generation.

REF~KY~NETMETER

Data Element Summary

	<u>Ref.</u>	<u>Data</u>		<u>Attributes</u>
	<u>Des.</u>	<u>Element</u>	<u>Name</u>	
<u>Mand.</u>	<u>REF01</u>	<u>128</u>	<u>Reference Identification Qualifier</u>	<u>M ID 2/3</u>
			<u>KY</u>	<u>Site Specific Procedures, Terms, and Conditions</u>
				<u>Special Meter Configuration</u>
<u>Must Use</u>	<u>REF02</u>	<u>127</u>	<u>Reference Identification</u>	<u>X AN 1/30</u>
			<u>The following codes are to be used:</u>	
			<u>NETMETER</u>	<u>Account has generation</u>

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## MODIFICATION to REF~TD Segment:

NY 814 Change (Account Maintenance)

**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:**  
**Notes:**

Utility Request: Conditional  
 ESCO Response: Optional  
  
 ESCO Request: Conditional  
 Utility Response: Optional  
  
 This segment is used to identify the data segment(s) sent at the account level that are being changed. See REF\*TD Segment (Reason for Change - Meter Level) 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  
 REF~TD~REFKY~D

### Data Element Summary

	Ref. Des.	Data Element	Name	Attributes
Mand.	REF01	128	Reference Identification Qualifier TD Reason for Change	M ID 2/3
Must Use	REF02	127	Reference Identification AMT7 Change ESCO Pricing Adjustment Credit Used to report a credit to the customer's account when the ESCO has charged a customer that receives service subject to a price guarantee more than what the customer would have paid the utility and the ESCO is required to provide a credit to the customer, i.e. a Guaranteed Savings Program (GSP) Credit. The Utility will include this one-time credit on the customer's next bill.	X AN 1/30
			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.	

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AMTB1	Change Benefit Amount Used to report receipt of a Basic HEAP Payment under ESCO Combined Billing using Single Retailer transactions.
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.
AMTBK	Change Disbursements for Protection and Preservation Used to report receipt of an Emergency HEAP Payment under ESCO Combined Billing using Single Retailer transactions.
AMTDP	Change Percentage of Service Tax Exempt
AMTFW	Change ESCO Fixed Charge
AMTKZ	Change ICAP ELECTRIC Service Only.
AMTRJ	Change ESCO Commodity Price
AMTUJ	Change ESCO Generic Credit Used to report a credit to the customer's account when the ESCO provides a generic credit to the customer. The Utility will include this one-time credit on the customer's next bill.
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 A Drop is pending. This code is used by the Utility to report a change in the Assigned Service End Date.
N18R	Change Contact Information or Service Address Use this code when the Customer contact information, e.g. name, phone, fax or email, on the account is being changed and/or a change of service address is being reported.
N1BT	Change Contact Information for Mailing or Mailing Address Use this code when the Customer contact information, e.g. name, phone, fax or email, for mailing and/or the mailing address is being changed.
REF11	Change ESCO Customer Account Number
REF12	Change Utility Account Number
REF5E	Change Consumer Identifier (APP Status)
REF65	Change Meter Read Cycle
REFBF	Change Bill Cycle
REFBLT	Change Billing Type (Bill Presenter)
REFGC	Change Gas Capacity Assignment Obligation GAS Service Only
REFU	Change Industrial Classification Code
REFIU	Barge Permit Number (Interval Usage Option)
<u>REFKY</u>	<u>Change Special Meter Configuration</u> <u>Supported only if indicated within a utility's Utility Maintained EDI Guide.</u>
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

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			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
<input type="checkbox"/>	<b>Conditional</b>	<b>REF03</b>	<b>352</b>	<b>Description</b>
			<b>A</b>	<b><u>Indicates the identifier in REF02 is being Added</u></b>
				<b>• <u>Special Meter Configuration (net meter add)</u></b>
			<b>D</b>	<b><u>Indicates the field identified in REF02 is being Deleted</u></b>
				<b>• <u>Special Meter Configuration (net meter removal)</u></b>