

NY Change Request NYCR005

Requester's Name: Kim Wall	Utility/ESCO/EDISP Name: Hansen Technologies	Phone # : 484-235-5879
Date of Request: 4/16/2020	Affected EDI Transaction Set #(s): 867MU, 867 MIU	E-Mail Address: Kim.Wall@HansenCX.com
Requested Priority High	Requested Implementation Date: By July 31, 2020	Status:

Brief Explanation: The 867 MU & 867 MIU currently has an optional segment REF*BLT to indicate the Bill Option (LDC or DUAL). This field needs to be changed to Required.

Detail Explanation: All utilities outside of New York who use EDI for data exchange indicate the bill option in the 867 Monthly Usage. New York's failure to do so has caused countless hours of researching accounts as well as customer dissatisfaction, particularly when a utility changes the bill option accepted on the Enrollment Response to another bill option without an EDI transaction.

In addition, when bill option changes occur, the utility may change the effective date without notice to the supplier, therefore causing another billing discrepancy. Having the bill option in the 867 transaction clearly identifies whether the utility is expecting to send/receive an 810 transaction.

The information is readily available in the utility systems and must be provided on the 867 Monthly Usage transaction (and 867 Interval Usage for ConEd) in order to ensure the customer is billed on time.

For Change Control Manager Use Only:

Date of Discussion:	Expected Implementation Date:	
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NY EDI Working Group Discussion and Resolution:

Priority Classifications

<i>Emergency Priority</i>	<i>Implemented within 10 days or otherwise directed by NY EDI Working Group</i>
<i>High Priority</i>	<i>Changes / Enhancements implemented with 30 days. The next release, or as otherwise directed by NY EDI Working Group</i>
<i>Low Priority</i>	<i>Changes / Enhancements implemented no earlier than 90 days, Future Release, or as otherwise directed by NY EDI Working Group</i>

Segment: **REF** Reference Identification (Bill Option)
Position: 120
Loop: N1 Optional (Dependent)
Level: Heading
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.
Comments:
Notes:

~~Optional Required.~~
~~As specified in its Utility Maintained EDI Guide, a Utility that supports this segment will indicate the bill Bill option that is in effect for the period defined in the 867.~~
 REF*BLT*LDC

Data Element Summary

	Ref.	Data	Attributes
	Des.	Element Name	
+	Must Use	REF01 128 Reference Identification Qualifier	M ID 2/3
		Code qualifying the Reference Identification	
		BLT Billing Type	
		Bill Presenter	
	Must Use	REF02 127 Reference Identification	X AN 1/30
		Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier	
		DUAL Each Party Presents a Separate Bill	
		ESP ESCO is the Consolidated Bill Presenter	
		LDC Utility is the Consolidated Bill Presenter	

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Comments:
Notes:

OptionalRequired
 As specified in its Utility Maintained EDI Guide, a Utility that supports this segment will indicate the ~~b~~Bill option that is in effect for the period defined in the 867.
 REF~BLT~LDC

Data Element Summary

	<u>Ref. Des.</u>	<u>Data Element</u>	<u>Name</u>	<u>Attributes</u>
Must Use	REF01	128	Reference Identification Qualifier Code qualifying the Reference Identification BLT Billing Type Bill Presenter	M ID 2/3
Must Use	REF02	127	Reference Identification Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier DUAL Each Party Presents a Separate Bill ESP ESCO is the Consolidated Bill Presenter LDC Utility is the Consolidated Bill Presenter	X AN 1/30