

Case No. 12-M-0476 et al.
 EDI Business/Technical Working Groups
 Net Meter Indicator/Community Generation
New 867HU/HIU/MU/MIU Segments
 8/2/2019

NY 867 Consumption History/Gas Profile

Segment: **REF** Reference Identification (Special Meter Configuration)
Position: 030
Loop: PTD Optional (Dependent)
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.
Comments:
Notes: Conditional
 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>Name</u> | <u>Attributes</u> |
|----------|-------------|----------------|--|-------------------|
| | <u>Des.</u> | <u>Element</u> | | |
| Mand. | REF01 | 128 | Reference Identification Qualifier KY Site Specific Procedures, Terms, and Conditions Special Meter Configuration | M ID 2/3 |
| Must Use | REF02 | 127 | Reference Identification Utility assigned load profile code. Load profile code definitions are accessible from the Utility's web site. NETMETER Account has generation | X AN 1/30 |

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Segment: **REF** Reference Identification (Community Distributed Generation)
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Loop: PTD Optional (Dependent)
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Usage: Optional (Dependent)
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Semantic Notes:
 1 REF04 contains data relating to the value cited in REF02.
Comments:
Notes: Conditional
 If supported by a utility, as specified in its Utility Maintained EDI Guide, used to notify the ESCO that the account has subscribed to Community Distributed Generation.
 REF~AN~Y

Data Element Summary

| | <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|-----------------|-------------|----------------|---|-------------------|
| <u>Mand.</u> | <u>Des.</u> | <u>Element</u> | | |
| | REF01 | 128 | Reference Identification Qualifier | M ID 2/3 |
| | | | AN Associated Purchase Orders | |
| | | | Community Distributed Generation | |
| Must Use | REF02 | 127 | Reference Identification | X AN 1/30 |
| | | | Utility assigned load profile code. Load profile code definitions are accessible from the Utility's web site. | |
| | | | N Account has not subscribed to Community Distributed Generation | |
| | | | Y Account has subscribed to Community Distributed Generation | |

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| NY 867 Consumption History/Gas Profile | | | | | | |
|--|-----|-----|---|---|---|--|
| LOOP ID - QTY 1 | | | | | | |
| 55 | 110 | QTY | Quantity (Projected Monthly Delivery Quantity) | O | 1 | |
| LOOP ID - QTY 1 | | | | | | |
| 56 | 110 | QTY | Quantity (Projected Daily Delivery Quantity) | O | 1 | |
| LOOP ID - QTY 1 | | | | | | |
| 57 | 110 | QTY | Quantity (Projected Balancing Use) | O | 1 | |
| 58 | 140 | AMT | Monetary Amount (Projected Swing Charges) | O | 1 | |
| LOOP ID - PTD 1 | | | | | | |
| 59 | 010 | PTD | Product Transfer and Resale Detail (Additional Information) | O | 1 | |
| 60 | 030 | REF | Reference Identification (Customer Supply Status) | O | 1 | |
| 61 | 030 | REF | Reference Identification (Industrial Classification Code) | O | 1 | |
| 62 | 030 | REF | Reference Identification (Utility Tax Exempt Status) | O | 1 | |
| 63 | 030 | REF | Reference Identification (Account Settlement Indicator) | O | 1 | |
| 64 | 030 | REF | Reference Identification (NYPA Discount Indicator) | O | 1 | |
| 65 | 030 | REF | Reference Identification (Utility Discount Indicator) | O | 1 | |
| 66 | 030 | REF | Reference Identification (Enrollment Block) | O | 1 | |
| 67 | 030 | REF | Reference Identification (Bill Cycle Code) | O | 1 | |
| 68 | 030 | REF | Reference Identification (Special Meter Configuration) | O | 1 | |
| 69 | 030 | REF | Reference Identification (Community Distributed Generation) | O | 1 | |
| LOOP ID - QTY >1 | | | | | | |
| 6870 | 110 | QTY | Quantity (ICAP) | O | 1 | |
| 6871 | 210 | DTM | Date Time Reference (ICAP Effective Dates) | O | 1 | |
| LOOP ID - QTY | | | | | | |
| 2072 | 110 | QTY | Quantity (Number of Meters) | O | 1 | |
| 2173 | 030 | REF | Reference Identification (Meter Number) | O | 1 | |

Summary:

| Page No. | Pos. No. | Seg. ID | Name | Req. Des. | Max Use | Loop Repeat | Notes and Comments |
|----------|----------|---------|-------------------------|-----------|---------|-------------|--------------------|
| E-1 | 030 | SE | Transaction Set Trailer | M | 1 | | Examples |

Transaction Set Notes:

1. The N1 loop is used to identify the transaction participants.
2. The PTD*BO and/or the PTD*BC and/or the PTD*BQ loops are sent in response to requests for historic usage. A PTD*BG loop may be sent with historic usage to provide gas profile factors.
3. The PTD*BG and the PTD*SM loops are sent by utilities in response to requests for gas profile data.

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Segment: **REF** Reference Identification (Special Meter Configuration)
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Level: Detail
Usage: Optional (Dependent)
Max Use: 1
Purpose: To specify identifying information
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Semantic Notes:
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Comments:
Notes: Conditional
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 REF~KY~NETMETER

Data Element Summary

| | <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|----------|-------------|----------------|--|-------------------|
| | <u>Des.</u> | <u>Element</u> | | |
| Mand. | REF01 | 128 | Reference Identification Qualifier KY Site Specific Procedures, Terms, and Conditions Special Meter Configuration | M ID 2/3 |
| Must Use | REF02 | 127 | Reference Identification Utility assigned load profile code. Load profile code definitions are accessible from the Utility's web site. NETMETER Account has generation | X AN 1/30 |

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Segment: **REF** Reference Identification (Community Distributed Generation)
Position: 030
Loop: PTD Optional (Dependent)
Level: Detail
Usage: Optional (Dependent)
Max Use: 1
Purpose: To specify identifying information
Syntax Notes:
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 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: Conditional
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 REF~AN~Y

Data Element Summary

| | <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|-----------------|--------------|----------------|--|-------------------|
| | <u>Des.</u> | <u>Element</u> | <u>Reference Identification Qualifier</u> | <u>M ID 2/3</u> |
| Mand. | REF01 | 128 | AN Associated Purchase Orders Community Distributed Generation | |
| Must Use | REF02 | 127 | Reference Identification Utility assigned load profile code. Load profile code definitions are accessible from the Utility's web site. N Account has not subscribed to Community Distributed Generation Y Account has subscribed to Community Distributed Generation | X AN 1/30 |

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NY 867 Historic Interval Usage

NY 867 Historic Interval Usage



| LOOP ID - PTD | | | | | | >1 |
|-----------------|----------------|----------------|--|--------------|--------------|----|
| 63 | 010 | PTD | Product Transfer and Resale Detail (Interval Meter Detail) | O | 1 | |
| 64 | 020 | DTM | Date/Time Reference (Period Start Date) | O | 1 | |
| 65 | 020 | DTM | Date/Time Reference (Period End Date) | O | 1 | |
| 66 | 030 | REF | Reference Identification (Meter Number) | O | 1 | |
| 67 | 030 | REF | Reference Identification (Utility Rate Service Class) | O | 1 | |
| 68 | 030 | REF | Reference Identification (Rate Sub Class) | O | 1 | |
| 69 | 030 | REF | Reference Identification (Interval Reading Period) | O | 1 | |
| 70 | 030 | REF | Reference Identification (Special Meter Configuration) | O | 1 | |
| 71 | 030 | REF | Reference Identification (Community Distributed Generation) | O | 1 | |
| LOOP ID - QTY | | | | | | >1 |
| 7072 | 110 | QTY | Quantity (Interval Quantity - Meter Level) | O | 1 | |
| 7173 | 210 | DTM | Date/Time Reference (Report Period) | O | 1 | |

Summary:

| Page No. | Pos. No. | Seg. ID | Name | Req. Des. | Max. Use | Loop Repeat | Notes and Comments |
|----------|----------|---------|-------------------------------------|-----------|----------|-------------|--------------------|
| E-1 | 030 | SE | Transaction Set Trailer Examples | M | 1 | | |

Transaction Set Notes:

1. The N1 loop is used to identify the transaction participants.
2. The PTD*BO and/or the PTD*BC and/or the PTD*BQ loops are sent in response to requests for historic usage. A PTD*BG loop may be sent with historic usage to provide gas profile factors.
3. The PTD*BG and the PTD*SM loops are sent by utilities in response to requests for gas profile data.

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Segment: **REF** Reference Identification (Special Meter Configuration)
Position: 030
Loop: PTD Optional (Dependent)
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.
Comments:
Notes: Conditional
 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>Name</u> | <u>Attributes</u> |
|----------|-------------|----------------|--|-------------------|
| | <u>Des.</u> | <u>Element</u> | | |
| Mand. | REF01 | 128 | Reference Identification Qualifier KY Site Specific Procedures, Terms, and Conditions Special Meter Configuration | M ID 2/3 |
| Must Use | REF02 | 127 | Reference Identification Utility assigned load profile code. Load profile code definitions are accessible from the Utility's web site. NETMETER Account has generation | X AN 1/30 |

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NY867 Monthly Usage

Segment: **REF** Reference Identification (Community Distributed Generation)
Position: 030
Loop: PTD Optional (Dependent)
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.
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Notes: Conditional
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 REF~AN~Y

Data Element Summary

| | <u>Ref. Des.</u> | <u>Data Element</u> | <u>Name</u> | <u>Attributes</u> |
|-----------------|------------------|---------------------|---|-------------------|
| Mand. | REF01 | 128 | Reference Identification Qualifier | M ID 2/3 |
| | | | AN Associated Purchase Orders Community Distributed Generation | |
| Must Use | REF02 | 127 | Reference Identification | X AN 1/30 |
| | | | Utility assigned load profile code. Load profile code definitions are accessible from the Utility's web site. N Account has not subscribed to Community Distributed Generation Y Account has subscribed to Community Distributed Generation | |

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 New 867HU/HIU/MU/MIU Segments
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NY867 Monthly Usage

NY867 Monthly Usage

867 Monthly Usage

Functional Group ID=

Introduction:

This Draft Standard for Trial Use contains the format and establishes the data contents of the Product Transfer and Resale Report Transaction Set (867) for use within the context of an Electronic Data Interchange (EDI) environment. The transaction set can be used to: (1) report information about product that has been transferred from one location to another report sales of product from one or more locations to an end customer; or (3) report sales of a product from one or more locations to an end customer, and demand beyond actual sales (lost orders). Report may be issued by either buyer or seller.

Notes:

This document contains the format and structure for the 867 transaction used to communicate either current billed consumption, current metered usage, calendar month estimated consumption or an Interim Bill Notice. Each 867 transaction contains current usage for a single account for a single commodity (Electric or Gas).

Heading:

| Page No. | Pos. No. | Seg. ID | Name | Req. Des. | Max Use | Loop Repeat | Notes and Comments |
|--------------|----------|---------|--|-----------|---------|-------------|--------------------|
| 3 | 010 | ST | Transaction Set Header | M | 1 | | |
| 4 | 020 | BPT | Beginning Segment for Product Transfer and Resale | M | 1 | | |
| 5 | 050 | DTM | Date Time Reference (Next Meter Read Date) | O | 1 | | |
| LOOP ID - N1 | | | | | | | 1 |
| 6 | 080 | N1 | Name (ESCO) | O | 1 | | |
| LOOP ID - N1 | | | | | | | 1 |
| 7 | 080 | N1 | Name (Utility) | O | 1 | | |
| LOOP ID - N1 | | | | | | | 1 |
| 8 | 080 | N1 | Name (Customer) | O | 1 | | |
| 9 | 100 | N3 | Address Information (Service Address) | O | 1 | | |
| 10 | 110 | N4 | Geographic Location (Service Address) | O | 1 | | |
| 11 | 120 | REF | Reference Identification (ESCO Customer Account Number) | O | 1 | | |
| 12 | 120 | REF | Reference Identification (Utility Account Number) | O | 1 | | |
| 13 | 120 | REF | Reference Identification (Previous Utility Account Number) | O | 1 | | |
| 14 | 120 | REF | Reference Identification (Bill Option) | O | 1 | | |

Detail:

| Page No. | Pos. No. | Seg. ID | Name | Req. Des. | Max Use | Loop Repeat | Notes and Comments |
|---------------|----------|---------|--|-----------|---------|-------------|--------------------|
| LOOP ID - PTD | | | | | | | >1 |
| 15 | 010 | PTD | Product Transfer and Resale Detail (Metered Consumption Summary) | M | 1 | | |
| 16 | 030 | REF | Reference Identification (Utility Rate Service Class) | O | 1 | | |
| 17 | 030 | REF | Reference Identification (Rate Sub Class) | O | 1 | | |
| 18 | 030 | REF | Reference Identification (Special Meter Configuration) | O | 1 | | |
| 19 | 030 | REF | Reference Identification (Rate-Sub Class-Community Distributed Generation) | O | 1 | | |
| LOOP ID - QTY | | | | | | | >1 |
| 1920 | 110 | QTY | Quantity | O | 1 | | |
| 1921 | 140 | AMT | Monetary Amount (Back Out Credit) | O | 1 | | |
| 1922 | 160 | MEA | Measurements | O | 40 | | |
| 23 | 210 | DTM | Date Time Reference (Period Start Date) | O | 1 | | |

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Usage: Optional (Dependent)
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 REF~KY~NETMETER

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| | <u>Ref. Des.</u> | <u>Data Element</u> | <u>Name</u> | <u>Attributes</u> |
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 REF~AN~Y

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|--------------|-------------|----------------|---|-------------------|
| <u>Mand.</u> | <u>Des.</u> | <u>Element</u> | <u>Reference Identification Qualifier</u> | <u>M ID 2/3</u> |
| | REF01 | 128 | AN Associated Purchase Orders Community Distributed Generation | |
| Must Use | REF02 | 127 | Reference Identification Utility assigned load profile code. Load profile code definitions are accessible from the Utility's web site. N Account has not subscribed to Community Distributed Generation Y Account has subscribed to Community Distributed Generation | X AN 1/30 |

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NY867 Monthly Interval Usage

Functional Group ID=**PT**

Introduction:

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Notes:

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Heading:

| Page No. | Pos. No. | Seg. ID | Name | Req. Des. | Max. Use | Loop Repeat | Notes and Comments |
|----------|----------|---------|--|-----------|----------|-------------|--------------------|
| 4 | 010 | ST | Transaction Set Header | M | 1 | | |
| 5 | 020 | BPT | Beginning Segment for Product Transfer and Resale | M | 1 | | |
| 6 | 050 | DTM | Date/Time Reference (Next Meter Read Date) | O | 1 | | |
| 7 | 080 | N1 | LOOP ID - N1 Name (ESCO) | O | 1 | 1 | |
| 8 | 080 | N1 | LOOP ID - N1 Name (Utility) | O | 1 | 1 | |
| 9 | 080 | N1 | LOOP ID - N1 Name (Customer) | O | 1 | 1 | |
| 10 | 100 | N3 | Address Information (Service Address) | O | 1 | | |
| 11 | 110 | N4 | Geographic Location (Service Address) | O | 1 | | |
| 12 | 120 | REF | Reference Identification (ESCO Customer Account Number) | O | 1 | | |
| 13 | 120 | REF | Reference Identification (Utility Account Number) | O | 1 | | |
| 14 | 120 | REF | Reference Identification (Previous Utility Account Number) | O | 1 | | |
| 15 | 120 | REF | Reference Identification (Bill Option) | O | 1 | | |

Detail:

| Page No. | Pos. No. | Seg. ID | Name | Req. Des. | Max. Use | Loop Repeat | Notes and Comments |
|--------------|----------|---------|---|-----------|----------|-------------|--------------------|
| 16 | 010 | PTD | LOOP ID - PTD Product Transfer and Resale Detail (Metered Consumption Summary) | M | 1 | >1 | |
| 17 | 030 | REF | Reference Identification (Utility Rate Service Class) | O | 1 | | |
| 18 | 030 | REF | Reference Identification (Rate Sub Class) | O | 1 | | |
| 19 | 030 | REF | Reference Identification (Special Meter Configuration) | O | 1 | | |
| 20 | 030 | REF | Reference Identification (Community Distributed Generation) | O | 1 | | |
| 1921 2022 | 110 | QTY | LOOP ID - QTY Quantity (Number of Meters) | O | 1 | >1 | |
| | 140 | AMT | Monetary Amount (Back Out Credit) | O | 1 | | |