

NY EDI TWG WORKPAPER
Transaction Assignments
8/8/2014 Meeting

	Requirement	Utilities / Market	EDI Transaction and Segment	Possible Values / Usage
Priority I	Enrollment Rejection Codes: When a utility rejects an EDI enrollment, the utility provides a reason code.	N/A	867HU: PTD*FG loop REF*ZV has been proposed	EB - Enrollment Blocked
	ICAP Tag: A specific prospective customer's Installed Capacity (ICAP) Tag, which indicates the customer's peak electricity demand.	CT, MA, ME (PSA*03) NY uses AMT*KZ in 814E Other markets use AMT*KC	867HU: PTD*FG loop QTY*KZ has been proposed	QTY*KZ with DTM007 segment for Current and Future ICAP loops
	Number of Meters with all Meter Numbers: Total number of meters and the ID's of all of the meters on a customer's account.	Currently being utilizing in NY EDI.	QTY02 and REF*MG Proposed addition to 867HU: PTD*FG loop QTY02 and REF*MG	Proposing additional QTY/REF*MG in PTD*FG loop
	Account Settlement Indicator: Whether the customer's account is settled with the ISO utilizing an actual "hourly" or a "class shape" methodology.	N/A	Proposed addition to 867HU: PTD*FG loop REF*TDT	C - Class Load Shape I - Interval M - Mixed
	NYPA / Recharge NY Indicator: Whether the customer receives any special incentives from the New York Power Authority.	N/A	Proposed addition to 867HU: PTD*FG loop REF*YP	N - Not enrolled with NYPA/ReCharge Y - Is enrolled with NYPA/ReCharge
	Utility Discount Indicator: Whether the customer receives any special delivery or commodity "first through the meter" incentives.	N/A	Proposed addition to 867HU: PTD*FG loop REF*SG	N - No utility discount or incentive Y - Is receiving a utility discount or incentive
	Industrial Classification Code: The customer's Standard Industrial Classification (SIC) Code.	N/A	Proposed addition to 867HU: PTD*FG loop REF*IJ	REF*02 = ID Code REF*03 = NAISC or SIC and explains what type of code is being sent in REF02
	Tax Exempt Status Whether the utility identifies the customer as tax exempt.	MAGAS (814E: REF*TX) MA, PJM, OHGAS) (814E AMT*DP for Tax Percentage)	Proposed addition to 867HU: PTD*FG loop REF*TX	N - No Exemption - Fully Taxed Y - Yes, some level of Tax Exemption
	Customer Supply Status: Whether the customer is served by the utility or another ESCO.	N/A	Proposed addition to 867HU: PTD*FG loop REF*ON	E - Supplied by ESCO at time of this transaction U - Supplied by Utility at time of this transaction
Priority I a	Energy-related value-added service indicator: The ESCO to provide information identifying whether the customer is purchasing an energy-related value-added service and the nature of that	???	???	???
	Low Income Status: Information on the customer's low income enrollment status.	N/A	Proposed addition to 867HU: PTD*FG loop REF*SE	LIHP = Low Income/HEEP Participant, NOTLIHP = Not Low Income/HEEP Participant)
	ESCO Credit: Provide any required refund as a credit on the customer's bill.	N/A	Proposed addition to: UBR Billing - 810 (new SAC04 Code) URR Billing - ??? ESCO 810 Adjustment	
Priority II	Full Service Bill Comparison: ESCO must be able to compare actual customer bills to what the customer would have been billed at the utility's rates on at least an annual basis.	N/A	Proposed addition to: 867HU - PTD*PB Loop	PTD*PB loop -Price Book