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| **Texas SET Change Control Request Form**  **Change Control Number: 2020 -819**  **Implementation Version: 5.0** |

**This Section Is Completed by Submitter of Change Control Request Only:**

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| **Submitter Name:**  Kathy Scott | **Submitting Company Name:**  CenterPoint Energy | **Phone Number:**  713-582-8654 |
| **Date of Submission:**  April 7, 2020 | **Affected TX SET Transaction(s):**  **814\_20** | **Submitter’s E-Mail Address:**  Kathy.Scott@CenterPointEnergy.com |
| **Texas SET Issue cross-reference number:** | Protocol Impact (Y/N):  N |
| **Detailed Description and Reason for Proposed Change(s):**  **This 814\_20 ESI ID Maintenance Request Change Control provides process improvements by clarify the NM1 (Meter Level Information):**  When the NM108 Meter Number = “NONE”  When the NM109 Meter Number = “ALL” and “NONE”  **This 814\_20 ESI ID Maintenance Request Change Control provides process improvements by stressing for**  **REF (Meter Multiplier):**  REF~4P will **NOT** be provided when the NM108 = 93 and NM109 = 'NONE' or 'UNMETERED'.  **This 814\_20 ESI ID Maintenance Request Change Control provides process improvements by correcting Required to Optional for REF~IX (Number of Dials):**  REF~IX segment will NOT be provided in the NM1 loop for ‘UNMETERED’ services or for Demand.  REF~IX will **NOT** be provided when the NM108 = 93 and NM109 = 'NONE' or 'UNMETERED'.  On February 19, 2020 after reviewing the draft version of this 814\_20 redlined changes consensus was gained by TX SET members in attendance to draft this change control that will be discussed during a subsequent TX SET Change Control Conference Call.  **Revisions are highlighted in yellow for TX SET May 20, 2020 review and Change Control Conference Call:**  REF~4P segment changed:  NM101 = MX (Meter Exchange): ‘**Required**’ to ‘**Optional**’  NM101 = MQ (Meter Information): ‘**Required**’ to ‘**Optional**’    REP~IX segment changed  NM101 = MX (Meter Exchange): ‘**Required**’ to ‘**Optional**’ NM101 = MQ (Meter Information): ‘**Required**’ to ‘**Optional**’  08/09/2022 – Corrected typo in the REF~4P. Corrected NMM109 to NM109 | | |
| **NOTE:** Requester must complete above fields and include a redlined example of modifications to each impacted implementation guide. This must be included at the time the request form is submitted.  **Please submit this completed form via e-mail to**[txsetchangecontrol@ercot.com](mailto:txsetchangecontrol@ercot.com) and RMS Chair***.*** | | |

**For ERCOT Change Control Manager Use Only:**

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| **Texas SET Recommendation:**  Recommend to approve for the next TX SET release | **Recommendation for Emergency (Y/N):**  N | **Date of TX SET Recommendation:**  04/15/2020 |
| **Detailed Description and Reason for Revision:**  05.06.2020 – Updated Change Control.  05.20.2020 – Recommend Approval as Non-emergency for a future release.  08.25.2022 – Recommend Approval as non-emergency for Texas SET 5.0 | | |
| **RMS Decision:**  Approved Future release | **Emergency (Y/N):**  N | **Date of RMS Decision:**  05/04/2021 |
| **Summary of RMS Discussion:**  Approved as non-emergency for a future release  09/13/2022 – RMS approved this change control as non-emergency for Texas SET 5.0 | | |

**814\_20 ESI ID Maintenance Request**

**Segment: NM1 Individual or Organizational Name (Meter Level Information)**

**Position:** 080

**Loop:** NM1 Optional

**Level:** Detail

**Usage:** Optional

**Max Use:** 1

**Purpose:** To supply the full name of an individual or organizational entity

**Syntax Notes:** **1** If either NM108 or NM109 is present, then the other is required.

**2** If NM111 is present, then NM110 is required.

**Semantic Notes:** **1** NM102 qualifies NM103.

**Comments:** **1** NM110 and NM111 further define the type of entity in NM101.

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| **Notes:** |  | Conversion/Create ESI ID Request: Required with "ALL" in NM109  Change ESI ID Information Request: Required if changing is at a meter level  Retire ESI ID Request: Not Used  The codes "ALL" or "NONE" in the NM109 can be used with a Change Transaction.  When replacing two meters with one meter, send two NM1 loops: one NM1 loop removes one of the existing meters and another NM1 loop exchanges the other existing meter. |
|  |  | NM1~MQ~3~~~~~~93~ALL (Conversion/Create Example)  NM1~MX~3~~~~~~32~GE1203948 (Change Example)  NM1~MQ~3~~~~~~93~ALL (Change Example)  NM1~MQ~3~~~~~~93~UNMETERED (Change Example)  NM1~MQ~3~~~~~~93~NONE (Change Example) |

**Data Element Summary**

**Ref. Data**

**Des. Element Name Attributes**

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Must Use** | **NM101** | **98** | **Entity Identifier Code** | | | | **M** |  | **ID 2/3** | | |
|  | | | Code identifying an organizational entity, a physical location, property or an individual | | | | | | | |
|  | | | | MA |  | Party for whom Item is Ultimately Intended | | | | |
|  | | | | | | Meter Addition - used when adding a meter or unmetered devices to an existing ESI ID | | | |
|  | | | | MQ |  | Metering Location | | | | |
|  | | | | | | Meter Information - used for everything except adding, removing or exchanging a specific meter.  MQ is used for Conversion/Opt-In. | | | |
|  | | | | MR |  | Medical Insurance Carrier | | | | |
|  | | | | | | Meter Removal - used when removing a meter or unmetered devices from an existing ESI ID | | | |
|  | | | | MX |  | Juvenile Witness | | | | |
|  | | | | | | Meter Exchange - used when exchanging a meter | | | |
| **Must Use** | **NM102** | **1065** | **Entity Type Qualifier** | | | | **M** |  | **ID 1/1** | | |
|  | | | Code qualifying the type of entity | | | | | | | |
|  | | | | 3 |  | Unknown | | | | |
| **Must Use** | **NM108** | **66** | **Identification Code Qualifier** | | | | **X** |  | **ID 1/2** | | |
|  | | | Code designating the system/method of code structure used for Identification Code (67) | | | | | | | |
|  | | | | 32 |  | Assigned by Property Operator | | | | |
|  | | | | | | Meter Number | | | |
|  | | | | 93 |  | Code assigned by the organization originating the transaction set | | | | |
|  | | | | | | This code is used when:  Meter has NOT been installed,  Meter information is unavailable or  Meter has been removed from the Premise by the TDSP  Used when NM109 contains:  "ALL", "UNMETERED" or "NONE". | | | |
| **Must Use** | **NM109** | **67** | **Identification Code** | | | | **X** |  | **AN 2/80** | | |
|  | | | Code identifying a party or other code | | | | | | | |
|  | | | Meter Number or  UNMETERED - for Unmetered Services,  ALL - for ALL Meters  NONE - when the TDSP has NOT installed the Meter, Meter information is unavailable, or Meter has been removed from the Premise by the TDSP  The code "ALL" cannot be used with a Meter Exchange Transaction.  The code "NONE" can only be used on a Meter Change Request where NM108 = '93'.  For a Meter Addition, this field will contain the new meter number.  For a Meter Removal, this field will contain the old meter number.  For a Meter Exchange, this field will contain the new meter number and the old meter number will be provided in REF~46.  Meter numbers will only contain uppercase letters (A to Z) and digits (0 to 9). Note that punctuation (spaces, dashes, etc.) must be excluded, and leading and trailing zeros that are part of the meter number must be present. | | | | | | | |

**Segment: REF Reference Identification (Meter Multiplier)**

**Position:** 130

**Loop:** NM1 Optional

**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.

**Comments:**

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| **Notes:** |  | There will be one REF~4P segment for each Meter Type, creating the potential for more than one REF~4P segment per NM1 Loop.  For instance, if the meter has multiple meter types, and therefore the REF~MT segment is REF~MT~COMBO, there will be multiple REF~4P segments, one to indicate the meter multiplier for each type. For example,  NM1~MQ~3~~~~~~32~1234568MG  REF~MT~COMBO  REF~4P~1200~K1015~TU^41  REF~4P~1~KH015~TU^41  Note: Format of the multiplier could be in the form of a fraction (e.g. 48.78432)  Also note that since the Meter Multiplier is required for each Time of Use, this segment is also used to determine which Time of Use will be sent on the 867 transaction. |
|  |  | Conversion/Create ESI ID Request: Not Used  Change ESI ID Information Request: Required if changing this item  Retire ESI ID Request: Not Used  NM101 = MA (Meter Addition): Required  NM101 = MX (Meter Exchange): Optional   * REF~4P Required when changing the Meter Multiplier (REF~TD~REF4P) * REF~4P NOT Required when NM108 = ‘93’ and NM109 = ‘NONE’ OR ‘UNMETERED’ * This segment will not be provided in the NM1 loop for UNMETERED Services   NM101 = MR (Meter Removal): Not Used  NM101 = MQ (Meter Information): Optional   * REF~4P Required when changing the Load Profile (REF~TD~REFLO) and Meter Information is known (NM108 = 32 and NM109 = 123456789 (Meter Number)). |
|  |  | REF~4P~10~KHMON~TU^41  REF~4P~1~K1MON~TU^41  REF~4P~1.5~K1MON~TU^41 |

**Data Element Summary**

**Ref. Data**

**Des. Element Name Attributes**

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Must Use** | **REF01** | **128** | **Reference Identification Qualifier** | | | | **M** |  | **ID 2/3** | | |
|  | | | Code qualifying the Reference Identification | | | | | | | |
|  | | | | 4P |  | Affiliation Number | | | | |
|  | | | | | | Meter Multiplier  (Ending Reading - Beginning Reading) \* Meter Multiplier = Billed Usage | | | |
| **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 | | | | | | | |
|  | | | Meter Multiplier | | | | | | | |
| **Must Use** | **REF03** | **352** | **Description** | | | | **X** |  | **AN 1/80** | | |
|  | | | A free-form description to clarify the related data elements and their content | | | | | | | |
|  | | | Meter Type (see REF~MT for valid codes). "COMBO" is not a valid code for this element. | | | | | | | |
| **Must Use** | **REF04** | **C040** | **Reference Identifier** | | | | **O** |  |  | | |
|  | | | To identify one or more reference numbers or identification numbers as specified by the Reference Qualifier | | | | | | | |
|  | | | Note this is a composite data element. Populate C04001 & C04002. | | | | | | | |
| **Must Use** | **C04001** | **128** | **Reference Identification Qualifier** | | | | **M** |  | **ID 2/3** | | |
|  | | | Code qualifying the Reference Identification | | | | | | | |
|  | | | | TU |  | Trial Location Code | | | | |
|  | | | | | | Time of Use | | | |
| **Must Use** | **C04002** | **127** | **Reference Identification** | | | | **M** |  | **AN 1/30** | | |
|  | | | Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier | | | | | | | |
|  | | | | 41 |  | Off Peak | | | | |
|  | | | | 42 |  | On Peak | | | | |
|  | | | | 43 |  | Intermediate Peak | | | | |
|  | | | | 51 |  | Totalizer | | | | |
|  | | | | | | Totalizer/Total/Max (Demand) | | | |
|  | | | | 71 |  | Summer Super On Peak | | | | |

**Segment: REF Reference Identification (Number of Dials)**

**Position:** 130

**Loop:** NM1 Optional

**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.

**Comments:**

|  |  |  |
| --- | --- | --- |
| **Notes:** |  | There will be one REF~IX segment for each applicable Meter Type, creating the potential for more than one REF~IX segment per NM1 Loop.  For instance, if the meter has multiple types, and therefore the REF~MT segment is REF~MT~COMBO, there may be multiple REF~IX segments, one to indicate the number of dials for each type that has dials.  For example,  NM1~MQ~3~~~~~~32~1234568MG  REF~MT~COMBO  REF~IX~6.0~KHMON~TU^51  REF~IX~5.1~KHMON~TU^51 |
|  |  | Conversion/Create ESI ID Request: Not Used  Change ESI ID Information Request: Required if changing this item  Retire ESI ID Request: Not Used  NM101 = MA (Meter Addition): Required  NM101 = MX (Meter Exchange): Optional   * REF~IX will NOT be provided in the NM1 loop if service type is ‘UNMETERED’ or Demand. * REF~IX will NOT be provided when the NM108 = ‘93’ and NM109 = 'NONE' or 'UNMETERED'. * This segment will not be provided in the NM1 loop for UNMETERED Services   NM101 = MR (Meter Removal): Not Used  NM101 = MQ (Meter Information): Optional   * REF~IX Required only if changing the number of dials |
|  |  | REF~IX~6.0~KHMON~TU^51 |

**Data Element Summary**

**Ref. Data**

**Des. Element Name Attributes**

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Must Use** | **REF01** | **128** | **Reference Identification Qualifier** | | | | **M** |  | **ID 2/3** | | |
|  | | | Code qualifying the Reference Identification | | | | | | | |
|  | | | | IX |  | Item Number | | | | |
|  | | | | | | Number of Dials on the Meter displayed as X.Y. The notation X.Y means that the meter has X dials to the left of the decimal point, and Y dials to the right. | | | |
| **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 | | | | | | | |
|  | | | Number of Dials | | | | | | | |
| **Must Use** | **REF03** | **352** | **Description** | | | | **X** |  | **AN 1/80** | | |
|  | | | A free-form description to clarify the related data elements and their content | | | | | | | |
|  | | | Meter Type (see REF~MT for valid codes). "COMBO" is not a valid code for this element. | | | | | | | |
| **Must Use** | **REF04** | **C040** | **Reference Identifier** | | | | **O** |  |  | | |
|  | | | To identify one or more reference numbers or identification numbers as specified by the Reference Qualifier | | | | | | | |
|  | | | Note that this is a composite data element. Populate C04001 and C04002. | | | | | | | |
| **Must Use** | **C04001** | **128** | **Reference Identification Qualifier** | | | | **M** |  | **ID 2/3** | | |
|  | | | Code qualifying the Reference Identification | | | | | | | |
|  | | | | TU |  | Trial Location Code | | | | |
|  | | | | | | Time of Use | | | |
| **Must Use** | **C04002** | **127** | **Reference Identification** | | | | **M** |  | **AN 1/30** | | |
|  | | | Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier | | | | | | | |
|  | | | | 41 |  | Off Peak | | | | |
|  | | | | 42 |  | On Peak | | | | |
|  | | | | 43 |  | Intermediate Peak | | | | |
|  | | | | 51 |  | Totalizer | | | | |
|  | | | | 71 |  | Summer Super On Peak | | | | |