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| **Texas SET Change Control Request Form**  **Change Control Number: 2023 – 845**  **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:**  10/24/2023 | **Affected TX SET Transaction(s):**  867\_03 | **Submitter’s E-Mail Address:**  Kathy.Scott@CenterPointEnergy.com |
| **Texas SET Issue cross-reference number:**  None | Protocol Impact (Y/N):  N |
| **Detailed Description and Reason for Proposed Change(s):**  This change control adds a new unique data element to the 867\_03 Monthly or Final Usage transaction that will be identified as “M” to represent “*Mobile Generation or Temporary Emergency Electric Energy Facility (TEEEF) deployed by TDSP”*.  This new “M” data element will be added to the following three existing REF~JH (Meter Role) segments found in the 867\_03 transaction:  (1) PTD = PL (Non-Interval Detail)  (2) PTD = BO (Interval Summary)  (3) PTD = PM (Interval Detail)  This new unique “M” REF~JH (Meter Role) will allow Market Participants more flexibility to develop and implement automated processes that can provide MPs with the ability to:  • Uniquely identify all ESI IDs that are affected by TDSPs’ *Mobile Generation or Temporary Emergency Electric Energy Facility (TEEEF)* deployment(s), especially when large volumes of ESI IDs may be impacted over an extended length of time.  • Automatically Report *Mobile Generation or TEEEF* deployment(s) since the “REF~JH~M” data element would apply strictly to ESI ID(s) involved into Mobile Generation or TEEEF deployment by the TDSP.  • Systematically process impacted *Mobile Generation or TEEEF* 867\_03 transactions since this new “REF~JH~M” data element could be a key identifier to assist REPs to update their validation rules when the 867\_03 Monthly or Final Usage beginning and ending meter readings when subtracted doesn’t match *Mobile Generation or TEEEF* kWh adjusted usage that was billed to the REP of Record in the matching 810\_02 TDSP Invoice. **NOTE**: Currently, REPs of Record are manually reviewing these exceptions requiring time to complete these reviews, potentially delaying Retail Customers’ bill from their REP of Record and creating concerns by REP of Records with how to manually manage large volumes of ESI IDs that may be impacted by future *Mobile Generation or TEEEF* deployment(s) that may occur at any point in time.  Adds clarification to the REF~JH~I (Ignore) “*Shall only be used to represent Customer’s Distributed Generation values. If there are multiple REF~JH~I loops in the transaction, ERCOT will only read and settle using the first REF~JH~I encountered in the transaction.”*. This clarification only applies the REF~JH~I (Meter Role) for the PTD = PL (Non-Interval Detail) segment. The other two Meter Role segments represent PTD = BO (Interval Summary) and PTD = PM (Interval Detail) where the 867\_03 transaction would not be applicable for use by ERCOT for Settlements. All Interval Data Recorder(s) (IDR(s)) Meter Roles are processed by ERCOT as either an Resource ID(s) or daily 15-minute interval data via LSE files. | | |
| **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 for Approval | **Recommendation for Emergency (Y/N):**  N | **Date of TX SET Recommendation:**  11/15/2023 |
| **Detailed Description and Reason for Revision:**  Recommend for Approval for Texas SET 5.0 | | |
| **RMS Decision:** | **Emergency (Y/N):** | **Date of RMS Decision:** |
| **Summary of RMS Discussion:** | | |

**Texas**

**Standard**

**Electronic**

**Transaction**

**867\_03:**

##### Monthly or Final Usage

Electronic Data Interchange

ANSI ASC X12 Ver/Rel 004010

Transaction Set 867

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

**Position:** 030

**Loop:** PTD Conditional

**Level:** Detail

**Usage:** Optional

**Max Use:** 20

**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:** |  | PTD = PL (Non-Interval Detail) |
|  |  | Required  REF~JH~I: Shall only be populated by the TDSP for Customer’s Distributed Generation values.  REF~JH~I: ERCOT shall read and settle kWh values populated in the REF~JH~I for only NIDR (NON-IDR) ESI ID(s). If there are multiple REF~JH~I loops in the transaction, ERCOT will only read and settle using the first REF~JH~I encountered in the transaction.  REF~JH~M: This data element may be populated by the TDSP at the TDSP’s discretion to indicate their deployment of Mobile Generation or Temporary Emergency Electric Energy Facility (TEEEF). This REF~JH~M will include TDSP adjusted kWh usage that was removed from the corresponding 810\_02 TDSP Invoice sent to REP of Record.  REF~JH~M: ERCOT shall NOT process kWh values for Settlements that is populated by the TDSP in the REF~JH~M. |
|  |  | REF~JH~A  REF~JH~I  REF~JH~M |

**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 | | | | | | | | |
|  | | | | JH |  | Tag | | | | | |
|  | | | | | | Meter Role | | | | |
| **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 | | | | | | | | |
|  | | | | A |  | Additive | | | | | |
|  | | | | | | This consumption must be added to the summarized total | | | | |
|  | | | | I |  | Ignore | | | | | |
|  | | | | | | Shall only be used by TDSP for Customer’s Distributed Generation values. If there are multiple REF~JH~I loops in the transaction, ERCOT will only read and settle using the first REF~JH~I encountered in the transaction. | | | | |
|  | | | | M |  | Mobile Generation or Temporary Emergency Electric Energy Facility (TEEEF) Deployed by TDSP | | | | | |
|  | | | | | | This code may be populated by the TDSP at the TDSP’s discretion to indicate TDSP’s deployment of Mobile Generation Facility or TEEEF.  If populated, the TDSP will provide total adjusted kWh usage resulting from this deployment.  Therefore, the kWh difference between beginning and ending meter readings when subtracted total usage may not match the Mobile Generation or TEEEF adjusted kWh usage that is being invoiced in the matching 810\_02 TDSP Invoice transaction. | | | |
|  | | | | S |  | Subtractive | | | | | |
|  | | | | | | This consumption must be subtracted from the summarized total  One use is to indicate to ERCOT that the 867\_03 is reporting generation volume for TDSP generation meters 10 MW or less. | | | | |

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

**Position:** 030

**Loop:** PTD Conditional

**Level:** Detail

**Usage:** Optional

**Max Use:** 20

**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:** |  | PTD = BO (Interval Summary) |
|  |  | Required  REF~JH~M: This data element may be populated by the TDSP at the TDSP’s discretion to indicate their deployment of Mobile Generation or Temporary Emergency Electric Energy Facility (TEEEF). This REF~JH~M will include TDSP adjusted kWh usage that was removed from the corresponding 810\_02 TDSP Invoice sent to REP of Record.  REF~JH~M: ERCOT shall NOT process kWh values for Settlements that is populated by the TDSP in the REF~JH~M. |
|  |  | REF~JH~A  REF~JH~I  REF~JH~M |

**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 | | | | | | | | |
|  | | | | JH |  | Tag | | | | | |
|  | | | | | | Meter Role | | | | |
| **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 | | | | | | | | |
|  | | | | A |  | Additive | | | | | |
|  | | | | | | This consumption contributed to the summarized total (do nothing) | | | | |
|  | | | | I |  | Ignore | | | | | |
|  | | | | | | This consumption did not contribute to the summarized total (do nothing) | | | | |
|  | | | | M |  | Mobile Generation or Temporary Emergency Electric Energy Facility (TEEEF) Deployed by TDSP | | | | | |
|  | | | | | | This code may be populated by the TDSP at the TDSP’s discretion to indicate TDSP’s deployment of Mobile Generation Facility or TEEEF.  If populated, the TDSP will provide total adjusted kWh usage resulting from this deployment.  Therefore, the kWh difference between beginning and ending meter readings when subtracted total usage may not match the Mobile Generation or TEEEF adjusted kWh usage that is being invoiced in the matching 810\_02 TDSP Invoice transaction. | | | |
|  | | | | S |  | Subtractive | | | | | |
|  | | | | | | This consumption must be subtracted from the summarized total | | | | |

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

**Position:** 030

**Loop:** PTD Conditional

**Level:** Detail

**Usage:** Optional

**Max Use:** 20

**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:** |  | PTD = PM (Interval Detail) |
|  |  | Required  REF~JH~M: This data element may be populated by the TDSP at the TDSP’s discretion to indicate their deployment of Mobile Generation or Temporary Emergency Electric Energy Facility (TEEEF). This REF~JH~M will include TDSP adjusted kWh usage that was removed from the corresponding 810\_02 TDSP Invoice sent to REP of Record.  REF~JH~M: ERCOT shall NOT process kWh values for Settlements that is populated by the TDSP in the REF~JH~M. |
|  |  | REF~JH~A  REF~JH~I  REF~JH~M |

**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 | | | | | | | | |
|  | | | | JH |  | Tag | | | | | |
|  | | | | | | Meter Role | | | | |
| **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 | | | | | | | | |
|  | | | | A |  | Additive | | | | | |
|  | | | | | | This consumption must be added to the summarized total | | | | |
|  | | | | I |  | Ignore | | | | | |
|  | | | | | | This consumption did not contribute to the summarized total (do nothing) | | | | |
|  | | | | M |  | Mobile Generation or Temporary Emergency Electric Energy Facility (TEEEF) Deployed by TDSP | | | | | |
|  | | | | | | This code may be populated by the TDSP at the TDSP’s discretion to indicate TDSP’s deployment of Mobile Generation Facility or TEEEF.  If populated, the TDSP will provide total adjusted kWh usage resulting from this deployment.  Therefore, the kWh difference between beginning and ending meter readings when subtracted total usage may not match the Mobile Generation or TEEEF adjusted kWh usage that is being invoiced in the matching 810\_02 TDSP Invoice transaction. | | | |
|  | | | | S |  | Subtractive | | | | | |
|  | | | | | | This consumption must be subtracted from the summarized total | | | | |