|  |
| --- |
| **Texas SET Change Control Request Form**  **Change Control Number: 2024 -851**  **Implementation Version: 5.0** |

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

|  |  |  |
| --- | --- | --- |
| **Submitter Name:**  Kathryn Thurman | **Submitting Company Name:**  ERCOT | **Phone Number:**  512-248-6747 |
| **Date of Submission:**  06/24/2024 | **Affected TX SET Transaction(s):**  814\_04 | **Submitter’s E-Mail Address:**  Kathryn.Thurman@ercot.com |
| **Texas SET Issue cross-reference number:**  NA | Protocol Impact (Y/N):  N |
| **Detailed Description and Reason for Proposed Change(s):**  Update the gray box in the 814\_04 for the SHF (Switch Hold Indicator) to reflect the SHF Reject Code is not valid when the LIN07 or LIN09 = MVO  SHF is not a valid reject in the 814\_25 transaction. If the SHF reject code is received on a Move Out to CSA, ERCOT is not able to send the reject to the MVO CR. | | |
| **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:**

|  |  |  |
| --- | --- | --- |
| **Texas SET Recommendation:**  Recommend Approval | **Recommendation for Emergency (Y/N):**  N | **Date of TX SET Recommendation:**  07/16/2024 |
| **Detailed Description and Reason for Revision:**  Recommend for Approval for Texas SET 5.0 | | |
| **RMS Decision:**  Approved for Texas SET 5.0 | **Emergency (Y/N):**  N | **Date of RMS Decision:**  08/06/2024 |
| **Summary of RMS Discussion:**  Approved as non-emergency for Texas SET 5.0 | | |

**Segment: REF Reference Identification (Rejection Reason)**

**Position:** 030

**Loop:** LIN 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:** |  | More than one rejection reason code may be sent by repeating the REF~7G segment.  Accept Response: Not Used  Reject Response: Required |
|  |  | REF~7G~A13~ADDITIONAL REASON TEXT HERE |

**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 | | | | | | | |
|  | | | | 7G |  | Data Quality Reject Reason | | | | |
|  | | | | | | Reject reasons associated with a reject status notification. | | | |
| **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 | | | | | | | |
|  | | | | 008 |  | ESI ID Exists But is Not Active | | | | |
|  | | | | | | Retired | | | |
|  | | | | 017 |  | Service Terminated because Service Provider went Out of Business | | | | |
|  | | | | | | Received initiating TX SET transaction from CR that is exiting the Market. For ERCOT use Only. | | | |
|  | | | | 090 |  | Greater than 90 in the future | | | | |
|  | | | | | | Transaction requested a date greater than 90 days in the future. | | | |
|  | | | | 150 |  | Move In Date Greater Than 150 Days in the Past | | | | |
|  | | | | | | TDSP's Usage and Invoicing transactions are limited to 150 Days in the Past.  (Inadvertent Gain/Loss or Customer Rescission Reject) | | | |
|  | | | | 270 |  | Greater than 270 in the past | | | | |
|  | | | | | | Transaction requested a date greater than 270 days in the past. | | | |
|  | | | | A13 |  | Other | | | | |
|  | | | | | | Explanation Required in REF03. | | | |
|  | | | | A76 |  | ESI ID Invalid or Not Found | | | | |
|  | | | | A78 |  | Item or Service Already Established | | | | |
|  | | | | | | Requested action has already completed. Used by TDSP and ERCOT only. | | | |
|  | | | | A83 |  | Invalid or Unauthorized Action | | | | |
|  | | | | | | Information provided was not supported in the Texas SET Standards. | | | |
|  | | | | ABN |  | Duplicate Request Received | | | | |
|  | | | | | | Used by TDSP to reject an 814\_03, which contains the same value in the BGN02 as a previously submitted 814\_03. The ABN code is to be used only for transactions between the TDSP and ERCOT. The code is not sent to the CR by ERCOT. | | | |
|  | | | | ACI |  | Action Code (ASI01) Invalid | | | | |
|  | | | | ANK |  | Invalid Source Information | | | | |
|  | | | | | | Unnecessary Billing Information Included. | | | |
|  | | | | API |  | Required information missing | | | | |
|  | | | | | | Explanation Required in REF03. May not be used in place of other, more specific error codes. | | | |
|  | | | | BIM |  | Billing Information Missing | | | | |
|  | | | | | | Information required in the N1~BT (Customer Billing Loop) not received. Used by Muni/Coops only. | | | |
|  | | | | CCL |  | Critical Care or Critical Load | | | | |
|  | | | | D76 |  | DUNS Number Invalid or Not Found | | | | |
|  | | | | DIP |  | Date In Past | | | | |
|  | | | | | | Request cannot be backdated. | | | |
|  | | | | FME |  | Force Majeure Event | | | | |
|  | | | | FRB |  | Incorrect Billing Type (REF~BLT) Requested | | | | |
|  | | | | | | Billing type indicated not supported by billing party | | | |
|  | | | | IBO |  | Invalid Backdate Originator | | | | |
|  | | | | | | Backdated request not part of a coordinated back-office clean up. | | | |
|  | | | | IMI |  | Invalid Membership Number or ID | | | | |
|  | | | | | | Membership ID or account number used by the MOU/EC TDSP does not exist, is inactive, or is otherwise invalid. For MOU/EC use only. | | | |
|  | | | | LFG |  | Leapfrog Scenario | | | | |
|  | | | | | | Third Party has gained or in the process of gaining this ESI ID.  (Inadvertent Gain/Loss or Customer Rescission Reject) | | | |
|  | | | | MTI |  | Maintenance Type Code (ASI02) Invalid | | | | |
|  | | | | MVO |  | Move-Out | | | | |
|  | | | | | | Move-Out is scheduled or has been completed by the TDSP.  (Inadvertent Gain/Loss or Customer Rescission Reject) | | | |
|  | | | | NFI |  | Not First In | | | | |
|  | | | | | | Explanation Required in REF03. An initiating transaction has a requested date that is the same as the scheduled meter read date on another scheduled transaction. | | | |
|  | | | | NVS |  | No Valid Safety Net | | | | |
|  | | | | | | Backdated request with no valid safety net. | | | |
|  | | | | PCI |  | Priority Code Invalid | | | | |
|  | | | | | | Priority Code Invalid or in conflict with date requested. Not valid when LIN07 or LIN09 contains MVO | | | |
|  | | | | RNE |  | Request Not Eligible | | | | |
|  | | | | | | Start date requested is earlier than the ESI-ID start date. | | | |
|  | | | | SBD |  | Scheduled to be De-energized | | | | |
|  | | | | | | ESI ID exists but scheduled to be de-energized on date requested. | | | |
|  | | | | SCP |  | Scheduling Conflict Priority | | | | |
|  | | | | | | Switch request caused conflict with transaction currently scheduled. | | | |
|  | | | | SHF |  | Switch Hold Indicator | | | | |
|  | | | | | | For TDSP use only when Switch Hold has been placed on Premise. This Switch Hold will block MVI or Switch request from being scheduled by the TDSP.  Not valid when LIN07 or LIN09 contains MVO | | | |
|  | | | | SNP |  | Safety NET Request Pending for Different CR | | | | |
|  | | | | | | For TDSP use when a Safety Net Move-In is scheduled and Mass Transition or Acquisition (BGN07='TS' or BGN07='AQ') transaction is received from ERCOT. This code is valid only when BGN07='TS' or BGN07='AQ'. | | | |
|  | | | | TCC |  | Competing Transaction Scheduled for the Same Date | | | | |
|  | | | | TMI |  | Invalid Move In on Temporary Service | | | | |
|  | | | | | | Only valid when LIN07 or LIN09 contains MVI. | | | |
| **Dep** | **REF03** | **352** | **Description** | | | | **X** |  | **AN 1/80** | | |
|  | | | A free-form description to clarify the related data elements and their content | | | | | | | |
|  | | | Used to further describe the reason code sent in REF02. Codes "A13", "API", and "NFI" require a text explanation in this element. | | | | | | | |