Orange and Rockland Utilities, Inc.
Enrollment Request and Response Supplemental Information
11/2023

1.	Processing and Timing of Responses for History Received as a Secondary Request to Enrollment	When **a** Request for History Usage is received as a secondary Request, O&R will send a response for the Enrollment and a response for the Historical usage request within 2 days.
2.	BGN06 / Reference Identification	For Enrollment responses that have no associated EDI Enrollment request (Enrollments by O&R into Portability Service), since there is no BGN02 value to populate in the BGN06 of the Response, O&R will place the literal "MANUAL" in the BGN06.
3.	N1 Name (ESCO) / ESCO Name	The ESCO may provide ESCO Name on Requests. If provided on the Request, the ESCO Name will not be used or processed by O&R. On Enrollment Responses, O&R will provide the ESCO Name as it appears in O&R files. Note, since O&R will provide the ESCO Name as it appears in O&R files, the ESCO Name provided on the Request may not exactly match the ESCO Name provided on the Response. For example, if ESCO provided "GREEN POWER" on the Enrollment Request, O&R may provide "GREEN POWER SOURCES" on the Enrollment Response.
4.	N1 Name (Utility Name)	Utility name will be provided. Note: For O&R the "Utility Name" on O&R's Enrollment Responses will vary based on which of the 2 O&R companies is serving the customer. (New York customers=Orange and Rockland; New Jersey customer; Rockland Electric and.)
5.	N1 Name (Customer) / Customer Name	If provided on the Enrollment Request, O&R will ignore the Customer Name. On Accept Responses, O&R will provide the Customer Name as it appears on the O&R account.. The N1*06 element "SP" will be sent by O&R in Portability Enrollment response.

6.	N1 Name (Name for Mailing) / Name for Mailing, N3 Mailing Address	On Accept Responses, O&R will provide the Mailing Address Name and Address, where one exists, for all billing scenarios, even when the ESCO is not the Bill Presenter.
7.	Administrative Communications Contact (Customer Phone Number)	Not used by O&R. O&R does not support Customer phone number, Fax, and email address

8.	N4 Geographic Location (Mailing Address) / All Data Segments Except Country Code	On Accept Responses, O&R will always provide the Customer's Mailing Address, where one exists.
9.	N4 Geographic Location (Mailing Address) / Country Code	For this release, O&R will not provide the Customer's Mailing Country Code.
10.	REF Reference Identification (Reject Response Reasons) / Description (REF03)	On Reject Responses, O&R will populate this data segment with its backend system error code and error text. O&R will do this to provide ESCOs with more company-specific rejection detail than currently outlined for REF02 (Reject Response Reasons).
11.	REF Reference Identification (Response Information or Warnings) / Reference Identification (REF02)	Will be sent on 814E response if the account does not have usage or the account is a Net Metered account
12.	Item Identification (LIN05)	O&R does not support gas profile (GP). If Gas Profile is requested. O&R will send Historical usage (HU).

13.	REF Reference Identification (Fee Approved/Applied) / Reference Identification	Not used at O&R on Enrollment Requests. This data element should not be provided by the ESCO.
14.	REF Reference Identification (ESCO Customer Account Number) / Reference Identification	Not required at O&R. If provided, O&R will return the account number in its response. Consolidated Billing.

15.	REF Reference Identification (Previous Utility Account Number) / Reference Identification	O&R does not change customer account numbers due to changes in billing cycle and will not use this field. The Previous Utility Account number (REF45) will be sent only in case of Service Portability enrollments
16.	REF Reference Identification (Utility Account Number for ESCO Reference Identification	At O&R, ESCOs must submit their O&R Account Number for identification purposes.
17.	REF Reference Identification (Utility Customer Account Number)	The REF03 element of this segment is used to further describe the Product/Service ID (LIN03, Data Element 234) for O&R. (The REF is attached at the end of this document.) The REF03 element must be sent only for the O&R Unmetered Service delivery points. Example: REF~12~1122334890~U will further define the Product/Service ID data element as UNMETERED Lighting Service.

18.	REF Reference Identification (Meter Cycle Code) / Reference Identification	On Accept Responses, O&R will provide the Meter Cycle Code, which indicates when meter reads are scheduled for this account. ESCO can use the Meter Cycle Code to retrieve schedule information from O&R's Retail Access web site at *https://apps.coned.com/oruretailaccess/default.asp*
19.	REF Reference Identification (Bill Cycle Code) / Reference Identification	This code will be provided by O&R to indicate when a Customer is scheduled for billing. Since O&R does not have Billing Cycles, the Meter Cycle code will be provided. (See Item 18 above). This code will be provided by O&R to indicate when a customer is scheduled for billing.
20.	REF Reference Identification (Bill Presenter) / Reference Identification	Required at O&R on Enrollment Requests. O&R will validate the Bill Presenter in conjunction with the Bill Calculator. O&R will also validate that the ESCO is an approved provider of the Billing Option being enrolled. O&R will always return this data segment on Accept Responses.

21.	REF Reference Identification (Bill Calculator) / Reference Identification	Required at O&R on Enrollment Requests. O&R will validate the Bill Calculator in conjunction with the Bill Presenter. O&R will also validate that the option is one offered by O&R, and that the ESCO is an approved provider of the Billing Option being enrolled. O&R will always return this data segment on Accept Responses.
22.	REF Reference Identification (Current Budget Billing Status) / Reference Identification	Not used at O&R on Enrollment Requests, since O&R does not provide a budget billing service for ESCO charges. This data element should not be provided by the ESCO. On Accept Responses, O&R will always send this data element.

23.	REF Reference Identification (Partial Participation Portion) / Reference Identification	Not used at O&R on Enrollment Requests or Responses, since partial participation does not apply to O&R accounts. This data element should not be provided by the ESCO.
24.	REF Reference Identification (Customer on Life Support) / Reference Identification	Not required at O&R on Enrollment Requests. Not provided at O&R on Enrollment Responses.
25.	REF Reference Identification (Gas Pool ID) / Reference Identification	Not used at O&R on Enrollment Requests. .This data element should not be provided by the ESCO. Not provided at O&R on Enrollment Responses.
26.	REF Reference Identification (Gas Capacity Assignment/Obligation) / Reference Identification	Required on O&R Gas Enrollment Requests. ESCO should default to "Y". O&R will return this data segment on Accept Responses. O&R capacity release procedures are described in SC11 tariff.
27.	REF Reference Identification (Gas Supply Service Option) / Reference Identification	Required on O&R Gas Enrollment Requests. ESCO must either send 'B' or 'S'. O&R will return this data segment on Accept Responses.

28.	REF Reference Identification (Gas Supply Service Option) / Description	Not Used on O&R Enrollment Requests. .

29.	REF Reference Identification (Human Needs Customer) / Reference Identification	Not Used on O&R Enrollments.
30.	REF Reference Identification (Portion Taxed Residential) / Reference Identification	Not Used at ORU
31.	AMT Monetary Amount (Tax Exemption Percent) / Monetary Amount	Not used at O&R

32.	AMT Monetary Amount (Commodity Price) / Monetary Amount	Required at O&R for Utility Consolidated Billing Enrollment Requests only (Utility is Bill Calculator and Bill Presenter). Should not be submitted by ESCO for other billing options. O&R will reject the Enrollment Request if not present and Request is for Utility Consolidated Billing. O&R will ignore this data segment if received for other billing scenarios. O&R will return this data on Accept Responses for Utility Consolidated Billing Enrollment Requests. O&R will return this data segment on Accept Responses for Utility Consolidated Billing Enrollment Requests.
33.	Monetary Amount (Customer's Tax Rate for ESCO Charges - 1)	Customer Tax Rate (AMT 9M) segment is Required at O&R for Utility Consolidated Billing Enrollment Requests for commodity sales tax. O&R will reject the Enrollment Request when Utility Consolidated Billing option is requested if this segment is not sent. O&R will reject the Enrollment Request if this segment is sent for DUAL billing option. O&R will return this data on Accept Responses for Utility Consolidated Billing Enrollment Requests
34.	Monetary Amount (Customer's Tax Rate for ESCO Charges - 2	Not Used at O&R
35	NM1 Metered or Un-Metered Service Points / Identification Code	On Accept Responses when service is metered, the meter number for each service point will be returned. If a meter number does not exist, Code "93" will be contain the literal "UNMETERED." The literal "ALL" will never be used on an enrollment response.

36.	REF Reference Identification (Utility Rate Service Class) / Reference Identification	On Accept Responses, O&R will provide the account rate code.
37.	REF Reference Identification (Rate Sub Class) / Reference Identification	Not Used at O&R on enrollment response
38.	REF Reference Identification (Utility Load Profile Group Code) / Reference Identification	On Electric Accept Responses, O&R will provide the STRATUM code. This field will not be returned on Gas Accept Responses.
39.	REF Reference Identification (Measurement Type and Reporting Interval) / Reference Identification	Not used at O&R on Enrollment Requests. This data element should not be provided by the ESCO. On Accept Responses, will be provided.
40.	Date/Time Reference (Future ICAP Effective Dates)	Not used at O&R
41.	Monetary Amount (Future ICAP)	Not used at O&R

42.	REF Reference Identification (Use Time of Day) / Reference Identification	Not used at O&R on Enrollment Requests. This data element should not be provided by the ESCO. On Accept Responses, will be provided. At O&R, additional Measurement Significance Codes are needed to correctly describe electric usage to be received. O&R uses the following Use Time of Day codes: 41 - Off Peak 42 - On Peak 43 - Intermediate Peak 51 - Total 73 = Summer Off Peak 45= Summer On Peak 74 = Summer Intermediate Peak 57= Summer Total 75 = Winter Off Peak 49 = Winter On Peak 50 = Winter Intermediate Peak 58 = Winter Total
43	REF Reference Identification (ESCO Rate Code) / Reference	Not used at O&R on Enrollment Requests. This data element should not be provided by the ESCO.
44	REF Reference Identification (Interval Usage Option)	Required. If not provided on request, will be omitted in response and option will default to Summary Usage. At O&R, there is no difference between usage at meter level and usage at account level. There is one meter per account per service; Interval data will be provided at meter level.
45	REF Reference Identification (Public Aggregator)	Not used. For CCA O&R utilizes a specific REFAJ

Segment: **REF** Reference Identification (Utility Account Number)

Position: 030

Loop: LIN   Optional (Must Use)

Level: Detail

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: Request: Required

Response: Required

REF~12~011231287654398

REF~12~011231287654398~U

Data Element Summary

	Ref. Des.	Data Element	Name		Attributes
Mand.	REF01	128	Reference Identification Qualifier		M ID 2/3
			12	Billing Account	

REF02 contains the Utility-assigned account number for the customer.

	Ref. Des.	Data Element	Name		Attributes
Must Use	REF02	127	Reference Identification		X AN 1/30

Utility assigned customer account number

The utility account number must be supplied without intervening spaces or non-alphanumeric characters. (Characters added to aid in visible presentation on a bill, for example, should be removed)

	Ref. Des.	Data Element	Name		Attributes
Cond	REF03	352	Unmetered Service Designator		X AN 1/80

The REF03 element in the REF*12 segment should only be sent to, or received by, Orange & Rockland when the commodity indicated in the LIN segment is Electric but the enrollment requested pertains only to the unmetered portion of the electric service on that account.   This element should NOT be sent when the enrollment request pertains to all electric service on the designated account number.

U   Un-Metered Service