**Texas**

**Standard**

**Electronic**

**Transaction**

**814\_18:**

##### Establish/Change/Delete CSA Request

Electronic Data Interchange

ANSI ASC X12 Ver/Rel 004010

Transaction Set 814

**Texas 814\_18:**

Establish/Change/Delete CSA Request

The CSA agreement allows the owner of a premise to maintain active electrical service when the existing tenant moves out, until a new tenant requests service. When the existing tenant moves out, service remains energized and responsibility for the energy consumption is transferred to the CSA CR.

ERCOT maintains a master database of active and pending CSA CR relationships for each ESI ID. An ESI ID will have only one active CSA CR at any point in time.

When termination of a CSA agreement occurs, ESI ID’s energized in the name of the CSA CR will remain energized until a move-out from the CSA CR or a move-in for another CR is performed.

This transaction set...

... from the new CSA CR to ERCOT, is used to establish the owner/controller’s new CSA CR in the registration system.

… from ERCOT to the MOU/EC TDSP, is used to validate the CSA relationship information in the MOU/EC TDSP system, unless otherwise indicated in Retail Market Guide Section 8.1.

… from the current CSA CR to ERCOT, is used to change an End Date for the current CSA in the registration system.

… from ERCOT to the MOU/EC TDSP, is used for notification of an updated End Date, unless otherwise indicated in Retail Market Guide Section 8.1.

... from the current CSA CR to ERCOT, is used to remove an existing CSA CR from the registration system.

... from ERCOT to the current CSA CR, is used for notification of deletion.

… from ERCOT to the MOU/EC TDSP, is used for notification of deletion, unless otherwise indicated in Retail Market Guide Section 8.1.

Document Flow:

IOU TDSP Territory…

* New CSA CR to ERCOT (to establish the CSA in ERCOT database)
* Current CSA CR to ERCOT (to change the CSA End Date in the ERCOT database)
* Current CSA CR to ERCOT (to delete the CSA in ERCOT database)
* ERCOT to Current CSA CR (to notify the CSA CR that the owner/controller has selected a new CSA CR)

MOU/EC TDSP Territory, unless otherwise indicated in Retail Market Guide Section 8.1…

* New CSA CR to ERCOT (a request to establish a new CSA in ERCOT database)
* ERCOT to MOU/EC TDSP (to request the acceptance of a new CSA)
* Current CSA CR to ERCOT (to change the CSA End Date in the ERCOT database)
* ERCOT to MOU/EC TDSP (to notify the MOU/EC TDSP that the End Date was changed)
* Current CSA CR to ERCOT (to delete the CSA in ERCOT database)
* ERCOT to MOU/EC TDSP (to notify the MOU/EC TDSP that the CSA is being removed)
* ERCOT to Current CSA CR (to notify the CSA CR that the owner/controller has selected a new CSA CR)

The Functional Acknowledgement (997) transaction set from the receiver of the originating transaction to the sender of the originating transaction, is used to acknowledge the receipt of the originating transaction and indicate whether the transaction passed ANSI X12 validation. This acknowledgement does not imply that the originating transaction passed Texas SET validation. “CR, TDSP, or ERCOT shall respond with a 997 within 24 hours of receipt of an inbound transaction.”

|  |  |  |
| --- | --- | --- |
|  |  | **Summary of Changes** |
| November 30, 2010  Version 3.0A |  | Initial Release |
| June 11, 2012  Version 4.0 |  | Updated examples for TX SET 4.0 |
| TBD  Version 5.0 |  | Added CSA Start Date and CSA End Date  Added new example for CSA Change |

814\_18 Example #1 of 4

Establish CSA CR Request – New CSA CR to ERCOT

|  |  |  |
| --- | --- | --- |
| This scenario, from the New CSA CR to ERCOT, is used to establish the owner/controller’s New CSA CR in ERCOT’s database. | | |
| ST~814~000000001 | | Transaction Type, Transaction Set Control Number |
| BGN~13~200805101201001~20230510~~~~~18 | | Request, Unique Transaction Number, Transaction Date, Original Transaction ID, SET Transaction Number |
| N1~8R~CUSTOMER NAME | | Customer Name |
|  | N4~~~77777 | Zip Code |
| N1~SJ~CSA CR NAME~1~987654321~~41 | | CSA CR Name and DUNS Number, Sender |
| N1~AY~ERCOT~1~183529049~~40 | | ERCOT Name and DUNS Number, Receiver |
| LIN~1~SH~EL~SH~CSA | | Establish CSA for owner/controller |
|  | ASI~7~021 | Request to Establish CSA |
|  | REF~Q5~~12345678910111231 | ESI ID |
|  | DTM~150~20230824 | CSA Start Date |
| SE~11~000000001 | | Number of Segments, Transaction Set Control Number |

814\_18 Example #2 of 4

Change CSA CR Request – New CSA CR to ERCOT

|  |  |  |
| --- | --- | --- |
| This scenario, from the Current CSA CR to ERCOT, is used to update the CSA End Date in ERCOT’s database. | | |
| ST~814~000000001 | | Transaction Type, Transaction Set Control Number |
| BGN~13~200805101201001~20230510~~~~~18 | | Request, Unique Transaction Number, Transaction Date, Original Transaction ID, SET Transaction Number |
| N1~8R~CUSTOMER NAME | | Customer Name |
|  | N4~~~77777 | Zip Code |
| N1~SJ~CSA CR NAME~1~987654321~~41 | | CSA CR Name and DUNS Number, Sender |
| N1~AY~ERCOT~1~183529049~~40 | | ERCOT Name and DUNS Number, Receiver |
| LIN~1~SH~EL~SH~CSA | | Establish CSA for owner/controller |
|  | ASI~7~001 | Request to Establish CSA |
|  | REF~Q5~~12345678910111231 | ESI ID |
|  | DTM~151~20231029 | New CSA End Date |
| SE~11~000000001 | | Number of Segments, Transaction Set Control Number |

814\_18 Example #3 of 4

Delete CSA CR Request – Current CSA CR to ERCOT

|  |  |  |
| --- | --- | --- |
| This scenario, from the Current CSA CR to ERCOT, is used to remove an existing CSA CR from ERCOT’s database. Owner/controller no longer wants CSA agreement with the CR. | | |
| ST~814~000000001 | | Transaction Type, Transaction Set Control Number |
| BGN~13~200805101201001~20080510~~~~~18 | | Request, Unique Transaction Number, Transaction Date, Original Transaction ID, SET Transaction Number |
| N1~AY~ERCOT~1~183529049~~40 | | ERCOT Name and DUNS Number, Receiver |
| N1~SJ~CSA CR NAME~1~987654321~~41 | | CSA CR Name and DUNS Number, Sender |
| LIN~1~SH~EL~SH~CSA | | Delete CSA for owner/controller |
|  | ASI~7~002 | Request to Delete CSA |
|  | REF~Q5~~12345678910111231 | ESI ID |
| SE~8~000000001 | | Number of Segments, Transaction Set Control Number |

814\_18 Example #4 of 4

Establish CSA CR Request –ERCOT to MCTDSP

|  |  |  |
| --- | --- | --- |
| This scenario, from ERCOT to the MCTDSP, is used to request the acceptance of a new CSA. | | |
| ST~814~000000001 | | Transaction Type, Transaction Set Control Number |
| BGN~13~200805101201001~20080510~~~200805101956534~~18 | | Request, Unique Transaction Number, Transaction Date, Original Transaction ID, SET Transaction Number |
| N1~8S~MCTDSP NAME~1~009876543~~40 | | TDSP Name and DUNS Number, Receiver |
| N1~AY~ERCOT~1~183529049~~41 | | ERCOT Name and DUNS Number, Sender |
| N1~SJ~CSA CR NAME~1~987654321 | | CSA CR Name and DUNS Number |
| N1~8R~CUSTOMER NAME | | Customer Name |
|  | N4~~~77777 | Zip Code |
| LIN~1~SH~EL~SH~CSA | | Establish CSA for owner/controller |
|  | ASI~7~021 | Request to Establish CSA |
|  | REF~Q5~~12345678910111231 | ESI ID |
|  | REF~BLT~LDC | Billing Type |
|  | REF~1W~~123456 | Membership ID |
|  | DTM~150~20230507 | CSA Start Date |
| SE~13~000000001 | | Number of Segments, Transaction Set Control Number |