**1. RECOMMENDED ACTION EFFECT OF EC VOTE TO ACCEPT**

 **RECOMMENDED ACTION**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Accept as requested | X | Change to Existing Practice |
| X | Accept as modified below |  | Status Quo |
|  | Decline |  | Correction |

**2. TYPE OF DEVELOPMENT / MAINTENANCE**

|  |  |
| --- | --- |
| **Per Request:** | **Per Recommendation:** |
|  | Initiation |  | Initiation |
| X | Modification | X | Modification |
|  | Interpretation |  | Interpretation |
|  | Withdrawal |  | Withdrawal |
|  |  |  |  |
|  | Principle *[x.1.z]* |  | Principle *[x.1.z]* |
|  | Definition *[x.2.z]* |  | Definition *[x.2.z]* |
|  | Business Practice Standard *[x.3.z]* |  | Business Practice Standard *[x.3.z]* |
|  | Document *[x.4.z]* |  | Document *[x.4.z]* |
| X | Data Element *[x.4.z]* | X | Data Element *[x.4.z]* |
| X | Code Value *[x.4.z]* | X | Code Value *[x.4.z]* |
| X | X12 Implementation Guide *[x.4.z]* | X | X12 Implementation Guide *[x.4.z]* |
|  | Business Process Documentation |  | Business Process Documentation |

**3. RECOMMENDATION**

**SUMMARY:** To be included in NAESB WGQ Standards Version 4.1

* Request to add data elements in the following data set(s) to accommodate the practice of charging distance-based rates for transportation services:

NAESB WGQ Standard No. 3.4.1 Transportation/Sales Invoice

**DATA DICTIONARY:** (for addition, modification or deletion of data elements)

**Document Name and No.:** NAESB WGQ Standard No. 3.4.1 Transportation/Sales Invoice

| **Business Name(Abbreviation)** | **Definition** | **EDI / FF Usage****(Transaction Level)** | **EDI / FF Usage****(Service Requester Level)** | **Condition** |
| --- | --- | --- | --- | --- |
| Charge Period(Chrg Per) | The period of time for which the rate applies. | SO | nu |  |
| Distance(Distance) | The measured distance between identified locations in the transaction. | SO | nu |  |
| Distance Formula(Formula) | Defined formula for the calculation needed to determine the amount due on distance-based charges. | SO | nu |  |

**CODE VALUES LOG:** (for addition, modification or deletion of code values)

 **Charge Period**

|  |  |  |
| --- | --- | --- |
| **Code Value Description** **(Abbreviation)**  | **Code Value Definition**  | **Code Value**  |
| Daily(Daily)  | Rate charged per day.  | DP |
| Monthly(Monthly) | Rate charged per month. | PM |

**Distance Formula**

|  |  |  |
| --- | --- | --- |
| **Code Value Description** **(Abbreviation)**  | **Code Value Definition**  | **Code Value**  |
| Dth-Miles(Dth-Miles)  | Quantity times distance. | Dth-Miles |
| 100 Dth-Miles(100 Dth-Miles) | Quantity times distance divided by 100. | 100 Dth-Miles |
| GJ-Kilometers(GJ-Kilometers) | Quantity times distance. | GJ-Kilometers |

**TECHNICAL CHANGE LOG:** (all instructions to accomplish the recommendation)

**Document Name and No.:** NAESB WGQ Standard No. 3.4.1 Transportation/Sales Invoice

|  |
| --- |
| **Description of Change: EDI X12 Mapping Guidelines** |
| **Sub-Detail: Applicable to Transaction Level****HL Loop Position 7600 / IT1 Loop Position 7700****IT1 Segment Position 7700**Element IT105 Data Element 639– Mark as ‘Used’Modify the Data Element Note as follows:*Charge Period**For NAESB WGQ, this element is sender’s option.*Mark all code values as ‘Not Used’.Mark Code Value ‘DP – Daily Price Per Unit’ as ‘Used’.Mark Code Value ‘PM – Monthly Price Per Unit’ as ‘Used’.**New Segment in IT1 Loop – Position 7700****Insert PID Segment Position 7725**Mark as ‘Used’.Modify ‘Max Use’ to ‘1’.Modify Segment Note as follows:*For NAESB WGQ, this segment is sender’s option.* Results should look as follows:Segment: PID Production / Item DescriptionPosition: 7725Loop: IT1Level: DetailUsage: OptionalMax Use: 1Notes: *For NAESB WGQ, this segment is sender’s option.*Mark all Data Elements as ‘Not Used’. Element PID01 Data Element 349– Mark as ‘Must Use’.Mark all code values as ‘Not Used’.Mark Code Value ‘F – Free-form’ as ‘Used’.Element PID05 Data Element 352 – Mark as ‘Must Use’.Modify the Data Element Note as follows:*Distance Formula*Add Code Value (Local) – ‘Dth-Miles’ with description ‘Quantity times Distance’.Add Code Value (Local) – ‘100 Dth-Miles’ with description ‘Quantity times Distance divided by 100’.Add Code Value (Local) – ‘GJ-Kilometers’ with description ‘Quantity times Distance’.Results should look as follows:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Ref.****Des.** | **Data****Element** | **Name** | **Attributes** |
| Must Use | PID01 | 349 | Item Description Type | M |  | ID 1/1 |
|  |  |  |  F Free-form |  |  |  |
|  |  |  |  |  |  |  |
| Must Use | PID05 | 352 | Description | X |  | AN 1/80 |
|  |  |  | *Distance Formula* |  |  |  |
|  |  |  |  *Dth-Miles Quantity times Distance* *100 Dth-Miles Quantity times Distance divided by 100* *GJ-Kilometers Quantity times Distance* |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

**New Segment in IT1 Loop – Position 7700****Insert MEA Segment Position 7750**Mark as ‘Used’.Modify ‘Max Use’ to ‘1’.Modify Segment Note as follows:*For NAESB WGQ, this segment is sender’s option.* Results will look as follows:Segment: MEA MeasurementsPosition: 7750Loop: IT1Level: DetailUsage: OptionalMax Use: 1Notes: *For NAESB WGQ, this segment is sender’s option.*Mark all Data Elements as ‘Not Used’. Element MEA02 Data Element 738 – Mark as ‘Must Use’.Mark all code values as ‘Not Used’.Mark Code Value ‘DS – Distance between Points’ as ‘Used’.Element MEA03 Data Element 739 – Mark as ‘Must Use’.Modify the Data Element Note as follows:*Distance*Element MEA04 Data Element 355 – Mark as ‘Must Use’.Mark all code values as ‘Not Used’.Mark Code Value ‘DH – Miles’ as ‘Used’.Mark Code Value ‘DK – Kilometers’ as ‘Used’.Results should look as follows:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Ref.****Des.** | **Data****Element** | **Name** | **Attributes** |
| Must Use | MEA02 | 738 | Measurement Qualifier | O |  | ID 1/3 |
|  |  |  |  DS Distance between Points |  |  |  |
|  |  |  |  |  |  |  |
| Must Use | MEA03 | 739 | Measurement Value | X |  | R 1/20 |
|  |  |  | *Distance* |  |  |  |
|  |  |  |  |  |  |  |
| Must Use | MEA04 | 355 | Unit or Basis for Measurement Code | X |  | ID 2/2 |
|  |  |  |  DH Miles DK Kilometers |  |  |  |
|  |  |  |  |  |  |  |

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| --- |
| **Description of Change: Data Element Cross Reference for ASC X12** |
| **Sub-detail: Applicable to Transaction Level****IT1 Segment**Add new SO data element ‘Charge Period’ to the IT1 Segment.**New PID Segment**Add new SO data element ‘Distance Formula’ to the PID Segment.**New MEA Segment**Add new SO data element ‘Distance’ to the MEA Segment.Results will look as follows:

| **Segment** | **Usage** | **Segment Name/NAESB Data Element Name** |
| --- | --- | --- |
| HL | M | Hierarchical Level segment (Line Detail) |
| IT1 | MCCSO | Line NumberQuantityUnit PriceCharge Period |
| PID | SO | Distance Formula |
| MEA | SO | Distance |
| REFREFREFREFREFREFREFREFREFREF | CCSOSOSOSOMAMAMAMA | Associated Contract RouteOffer NumberReleaser Contract NumberReplacement Shipper Contract NumberDiscount IdentifierDownstream Contract IdentifierPackage IDReplacement Release CodeUpstream Contract Identifier |

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**4. SUPPORTING DOCUMENTATION**

1. **Description of Request:**

Add Data Elements to the NAESB WGQ Standard 3.4.1 Transportation / Sales Invoice to accommodate the practice of charging Distance Based Rates for transportation services. These charges use a combination of the distance between the receipt and delivery locations along with daily or monthly charges to calculate the amount due for transportation. Sample calculations include:

• 100 Dth-Mile Calculation

o (Dth) \* (100-Miles) \* (Monthly Rate) = Amount Due

o Where “100-Miles” represents the total miles between the receipt and delivery location, divided by 100.

• GJ-Kilometer Calculation

o (GJ) \* (Kilometers) \* (Monthly Rate) = Amount Due

o Pipeline in Canada that connects to US pipelines.

1. **Reason for of Minor Correction/Clarification:**

These modifications will incorporate new data elements that will allow the pipeline to convey additional information to the shippers to fully describe the applicable distance-based invoice charges.

1. **Description of Recommendation:**

**Business Practices Subcommittee (BPS)**

See the following meeting minutes for the Business Practices Subcommittee:

* October 8, 2024
* October 15, 2024

**Instructions from BPS:**

The WGQ BPS instructs the Joint Information Requirements and Technical Subcommittees to add Data Elements to accommodate the Sender’s Option Business Practice of charging distance-based rates for transportation services in the NAESB WGQ Standard No. 3.4.1 Transportation/Sales Invoice. Additionally, review all additional datasets and make corresponding changes, including adding code values, as needed.

**Joint Information Requirements / Technical Subcommittees**

See the following meeting minutes for the Joint Information Requirements / Technical Subcommittees:

* October 24, 2024

**Motion:**

Adopt the proposed implementation for R24004 to be applied in NAESB WGQ Version 4.1, as set forth in Attachment 1 to the Oct 24, 2024,meeting minutes of the NAESB WGQ Joint Information Requirements / Technical Subcommittees.

*Motion*