**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 Description  Position: 7725  Loop: IT1  Level: Detail  Usage: Optional  Max Use: 1  Notes: *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 Measurements  Position: 7750  Loop: IT1  Level: Detail  Usage: Optional  Max Use: 1  Notes: *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 |  |  |  | |  |  |  |  |  |  |  | |

|  |
| --- |
| **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 | M C C SO | Line Number Quantity Unit Price Charge Period | | PID | SO | Distance Formula | | MEA | SO | Distance | | REF REF REF REF REF REF REF REF REF REF | C C SO SO SO SO MA MA MA MA | Associated Contract  Route Offer Number Releaser Contract Number Replacement Shipper Contract Number Discount Identifier Downstream Contract Identifier Package ID Replacement Release Code Upstream Contract Identifier | |

**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
* November 19, 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*