**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]* |
|  | Data Element *[x.4.z]* |  | 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 applied in NAESB WGQ Standards Version 4.1

* Add new code value(s) for the data element ‘Service Requester Level Charge/Allowance Amount Descriptor’ in the following data sets:

NAESB WGQ Standard No. 3.4.1 Transportation/Sales Invoice

NAESB WGQ Standard No. 3.4.4 Service Requester Level Charge/Allowance Invoice

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

**Document Name and No.:**

NAESB WGQ Standard No. 3.4.1 Transportation/Sales Invoice

NAESB WGQ Standard No. 3.4.4 Service Requester Level Charge/Allowance Invoice

**Service Requester Level Charge/Allowance Amount Descriptor**

| **Code Value Description  (Abbreviation)** | **Code Value Definition** | **Code Value** |
| --- | --- | --- |
| Adjustments (Adj) | Invoice Adjustments including Prior Period Adjustments | BM |
| Tax (Tax) | Tax related charges | T |

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

**Document Name and No.:**

NAESB WGQ Standard No. 3.4.1 Transportation/Sales Invoice

NAESB WGQ Standard No. 3.4.4 Service Requester Level Charge/Allowance Invoice

|  |
| --- |
| **Description of Change: Transaction Set Tables** |
| AMT Segments (Sub-detail – HL03 = ‘CH’)  Element Name (AMT01) Service Requester Level Charge/Allowance Amount Descriptor  AMT01 – Add the following code values alphanumerically by code value:  ‘BM’ with AMT01 Description ‘Adjustments’  ‘T’ with AMT01 Description ‘Tax’ |

**4. SUPPORTING DOCUMENTATION**

1. **Description of Request:**

Add two new code values to the ‘Service Requester Level Charge/Allowance Amount’ data element.

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

New code values needed to better describe charges on Invoices.

1. **Description of Recommendation:**

**Information Requirements / Technical Subcommittee**

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

* Sept 4, 2024

**Motion:**

Adopt the proposed implementation for MC24003 to be applied in NAESB WGQ Version 4.1, as set forth in Attachment 1 to the Sept 4, 2024,meeting minutes of the NAESB WGQ Joint Information Requirements / Technical Subcommittees.

*Motion Passed*