



Rate Adjustment Tutorial

Rate Adjustment Video Tutorial: [Rate Adjustment Video Tutorial](#)

Access & Security

To request a rate adjustment, the following prerequisites are required:

- 1) A fully executed active contract that has a term date equal to or greater than the term of a requested rate adjustment.
- 2) Customer user has the appropriate security to request a rate adjustment (Service Request – External security role)

Rate Adjustment Request

- In the Customer Activities section in CSI, click on the “Contracts” tab

The screenshot shows the "Contract Search" interface. On the left is a navigation menu with "Customer Activities" expanded, showing options like "Nominations", "Flowing Gas", "Invoicing", "Capacity Release", "Contracts", "Service Request", "Contract", "Admin Contract", "Reports", "Rate Adjustment - OLD", "Storage Reports", "Customer Contract", and "Locations & Meters". The "Contracts" tab is selected. The main area contains search filters: "Svc Req" (14507 - Racer Gas Transmission), "Svc Req K:" (TA29522), "Process Status" (Active), "Active On Date" (12/13/2019), "Rate Schedule" (Select...), and "Terminated Between" (empty). A "Retrieve" button is in the top right. Below the filters is a table with columns: Svc Req K Prefix, Svc Req K Id, Svc Req Id, Status, Begin Date, End Date, Effective Date, Termination Date, Rate Sch, Svc Req Prop, and Svc Req Name. One row is visible with values: TA, 29522, 5215, Active, 12/10/2019, 9/1/2025, 12/10/2019, 9/1/2025, FTS, 14507, Racer Gas. At the bottom, it says "1 - 1 of 1 items".

- Click on the “Contract” tab - This will bring up the Contract Search screen
- The “Svc. Req:” field will populate based on the user’s sign-in information. If the user is affiliated with another company, they will need to choose the correct company from the dropdown box.
- Under the “Svc Req K:” field, choose the desired contract.
- In the “Process Status” dropdown choose “Active”.
- Click on the “Retrieve” button in the upper right-hand corner of the screen. The search results will populate in the grid table.
- Click the “Select” button next to the desired contract. The contract card will open (seven tabs of information).

Svc Req K: TA29522

Svc Req: 14507 - Racer Gas Transmission - 919191919

General Information Detail Comments 0 Attachments Documents Amendments Rate Adjustment

+ Create Rate Adjustment

	Id	Routing Status	Process Status	Rate /
View	24835	Pending Review By TSP	Submitted	12/12
View	24834	Pending Review By TSP	Submitted	12/12
View	24829	Pending Review By TSP	Submitted	12/11
View	24828	Pending Review By TSP	Submitted	12/11
View	24827	Pending Review By TSP	Submitted	12/11
View	24826	Pending Review By TSP	Submitted	12/10

20 items per page

- Choose the tab labeled “Rate Adjustment”
- Click on the button “Create Rate Adjustment” to request a new rate adjustment. If the user does not have appropriate security to request a rate adjustment, an error message will be displayed.

Rate Adjustment Information

Rate Begin Date: 01/01/2020 Rate End Date: 02/01/2020

Rate Adjustment Type: Receipt to Delivery Location Zone: Market - TA

Charge Type: RES

Electronic Signature Acceptable: ☒



Rate Entry: Rate Period

Begin Date	End Date	Rate
01/01/2020	02/01/2020	0.050000



- Once in the Rate Adjustment tab, begin inputting data for the Rate Adjustment request.
 - Enter the “Rate Begin Date” or use the calendar to choose the date
 - Enter the “Rate End Date” or use the calendar to choose the date
 - Next select the “Rate Adjustment Type”. Choose one of the following;
 - “Locations – Delivery” – (Discounted Rate to selected Primary and/or Secondary Locations)
 - “Receipt to Delivery” – (Discounted Rate applies only if transported from specific “Discounted Receipt(s)” to specific “Discounted Delivery(s)”)
 - Choose “Location Zone” (certain contracts FTS-P, FTS-M will default accordingly)

- Market TA
 - Production TA
- Choose Charge type
 - ITS contracts will default to CMD (commodity for an IT contract)
 - FTS contracts will choose from
 1. RES- Reservation
 2. ORA- Authorized Overrun
 3. ORC- Overrun Capacity Non-Chargeable
- Electronic Signature Acceptable will default based on the Customer's electronic contracting status. This option can be unchecked if it is not wanted for this specific request.
- Rate Entry has two choices:
 - Rate Period (default)
 - Quantity Range
- Rate Period Options:
 - Enter Begin Date- Defaults to the rate begin date entered earlier
 - Enter End Date- Defaults to the rate end date entered earlier
 - Enter Rate
 - Multiple date ranges with multiple rates can be entered by clicking the "+" beside the Begin Date and repeat the process above. Make sure not to overlap dates. The system will allow gaps in the dates, but the system will give a warning message to make sure this is the intent.
- Quantity Range Options:
 - Click on Add Quantity Range
 - Enter Min Qty
 - Enter Max Qty
 - Enter Rate
 - Multiple date ranges with multiple rates can be entered by clicking the "+" beside the Begin Date and repeat the process above. Make sure not to overlap dates. The system will allow to have gaps in the dates, but the system will give a warning message to make sure this is the intent.

Receipt

► Open Selector 					
	Rec Loc ▼	Rec Loc Name ▼	Line Segment ▼	Pooling Area ▼	Loc Type ↑ ▼
	999000	Prd/Mkt Interface	909 - Prd/Mkt Interfaces	P	Primary
◀ ◁ 1 ▷ ▶ ▶▶ 20 items per page 1 - 1 of 1 items					

Delivery

► Open Selector 					
	Del Loc ▼	Del Loc Name ▼	Line Segment ▼	Pooling Area ▼	Loc Type ↑ ▼
	142	Summit Rogersville	455 - Springfield	MA	Primary
◀ ◁ 1 ▷ ▶ ▶▶ 20 items per page 1 - 1 of 1 items					

- Locations - Delivery as Rate Adjustment Type:
 - Go to “Delivery” in the bottom section of the screen, click on “Open Selector”
 - Either choose the Del Loc by clicking on the “+” or start typing in the filter to bring up the Location and then click on the “+” (search by typing in the location number or by name)
 - Close selector when finished choosing Delivery Locations
- Receipts - Delivery as Rate Adjustment Type:
 - Go to “Receipt” in the bottom section of the screen, click on “Open Selector”
 - Either choose the Del Loc wanted by clicking on the “+” or start typing in the filter to bring up the Location wanted and then click on the “+” (search by typing in the location number or by name)
 - Close selector when finished choosing Receipt Locations
 - Then go to “Delivery”, click on “Open Selector”
 - Either choose the Del Loc that by clicking on the “+” or start typing in the filter to bring up the Location you want and then click on the “+” (search by typing in the location number or by name)
 - Close selector when finished choosing Delivery Locations

Svc Req K: TA29522

Rate Sched: FTS

Routing Status: Pending Submission

Original Termination Date: 09/01/2025

Save

- Click on “Save” (the top right-hand corner of the screen)
- Confirm the entered information is correct – if any additional edits are made, click on “save” again
- Once reviewed, click on “Submit”

Note: Do not use the arrow keys to get out of any box or field. Always use the tab button or use the mouse to click out of the field.

CSI Help Desk

- Please contact us at the CSI Help Desk number (270-852-5123) with any additional Rate Adjustment questions.