

## **Instructions for qualifying As A Meter Data Management Agent (MDMA) in Arizona. Draft 6/8/98**

### ***Background***

The ACC Decision directed the ACC working groups to develop a Meter Data Management Agent qualification/approval process for those ESPs and MDMA's who wish to offer MDMA services.

The ACC requires that potential MDMA's comply with current LDC standards in experience, education and training in order to perform the following functions of an MDMA:

- Manage the meter reading schedule
- Read and retrieve meter data
- Calculate usage
- Validate, edit and estimate meter data
- Format data
- Manage data on MDMA server
- Meter/device management

(The intent of this document is to provide instructions on what is required to become a qualified/approved MDMA)

### ***Application***

The potential MDMA completes the "Application for MDMA Services" (Attached)

### ***Checklist***

A checklist identifying all required written documentation will also be included with the application. (Attached)

### ***Written Requirements***

The potential MDMA forwards the completed application, the checklist as well as all written requirements to:

Address of LDC representative. Goes here.

The LDC's will review the submitted documentation of this test, determine if the potential MDMA is compliant with the LDC's standards and notify the MDMA via e-mail. The LDC's will establish a goal of 10 business days to review the documentation and respond to the potential MDMA. If the applicant is found to be compliant, after coordination with the LDC's Meter Reading organization concerning read scheduling, the MDMA may begin to offer services immediately. Omitted documentation of the submitted written requirements will result in the LDC requesting that additional information. If it is deemed after the LDC's review of the submitted written requirements that the potential MDMA's process is insufficient, the potential MDMA will fail the written requirements portion and will need to resubmit for qualification/approval.

### ***Server Acceptance Test***

Subsequent to the LDC receiving the completed qualification documentation, the potential MDMA may contact the LDC to schedule the acceptance test.

The LDC will then provide the potential MDMA with data for the server acceptance test. The purpose of the server acceptance test is for the potential MDMA to demonstrate that it can: calculate usage; validate; estimate and edit usage; format the usage in the Common (California) Metering Exchange Protocol (CMEP) format; post the data to the MDMA's servers; and provide the LDC with access to the servers. Detailed steps are outlined in the MDMA Server Acceptance Testing document.

The acceptance test is then performed. The LDC's have established a 48 hour turn-around time requirement for the completion of this test.

If the potential MDMA fails the server acceptance test the first time, they can reschedule for re-test. However, if a failure occurs twice, the potential MDMA must wait three months or other agreed to time frame before re-testing will be allowed.

In addition, re-testing will be required if new software is installed or if new technology is implemented by the potential MDMA and their use of the server.

### ***Back-up Reading Process***

If the potential MDMA's primary source of reading meters is a method other than the manual process, the potential MDMA, in addition to submitting documentation on its primary method must also demonstrate that it has a capable back-up process in place (details of this is also outlined on the attached checklist).

**Data Format**

MDMA data format requirements for each LDC is included in this package as an Appendix. Files must be submitted in comma delimited file format per California Metering Exchange Protocol (CMEP).

**Security and Confidentiality** Data security and confidentiality requirements are outlined in more detail by each LDC. However in general, data must be located in a secure facility and have Firewall or equivalent protection.

**Current customer lists**

At the LDC discretion, the LDC may elect to query current customers of the potential MDMA if customer satisfaction is indicated then the LDC may approve the MDMA without doing all of the testing required above. Server access testing will be done regardless.

**Help Desk**

The ACC decision requires that a technical help desk will be provided by the LDC's as well as MDMA's. Each LDC and MDMA's must provide a technical support number. This phone must be answered immediately during normal business hours. However, after hour calls regarding the server must be returned within one hour. All other after hour calls can be deferred to the next business day.

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Notes:

Current experiences with California MDMA's from APS retail side. As of 6/5/98.

Many problems from one of the two MDMA vendors we are dealing with.

Lots of zero reads come though as OK reads.

Estimation process flawed - estimates a blocks of data then the next interval is random number.

Large percentage of estimated data. Large blocks (several days) of estimated data on some meters.

Spikes get though up to 3 times normal read (15min reads).

A large percentage of meters contain some estimated data.

Data that is obviously profiled even though we are paying for interval metering.

Data that changes but not flagged as adjusted.

Frequent server failures from both MDMA vendors.

Slow response time for request to verify or fix data.

Data not posted when it is supposed to. End of cycle data over week late.

Wrong meter data being posted.

## APPLICATION FOR MDMA APPROVAL

**Purpose:** This application and the attached documents are to be used by Applicants when applying for Meter Data Management Agent (MDMA) acceptance. Use this cover letter and the attached list to indicate what information you have included with your application and to ensure that you have all the required documentation.

You will receive an acknowledgment that we have received your application, as well as any necessary requests for additional information, within ten business days. You will also receive information on the Acceptance Test with sample data, contact names and procedures.

Even if a LDC approves this application, the MDMA is not authorized to provide MDMA services except on behalf of an Energy Services Provider (ESP). The ESP must be duly authorized to provide direct access services in a LDC service.

By signing this agreement the applicant agrees to keep confidential all data transmitted to it by the LDC in the acceptance testing process.

**MDMA NAME:** \_\_\_\_\_ **CONTACT PERSON:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**CITY:** \_\_\_\_\_ **STATE:** \_\_\_\_\_ **ZIP:** \_\_\_\_\_

**BUSINESS PHONE:** (    ) \_\_\_\_\_ **E-MAIL ADDRESS** \_\_\_\_\_

### THE INFORMATION BELOW IS NEEDED FOR CONNECTIVITY:

**COMPLETE URL ADDRESS:** \_\_\_\_\_

**USER CODE:** \_\_\_\_\_

**PASSWORD:** \_\_\_\_\_

### LIST OF ESP S YOU ARE DOING BUSINESS WITH:

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Priority is given to those MDMA's which are doing business with an ESP that has a signed agreement with the LDC.

**SIGNATURE:** \_\_\_\_\_ **TITLE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

Signature should be someone who has legal authority at the MDMA business, i.e., officer.

**MDMA Services Applied For:**

**Interval Data Services (Hourly)**

**Cumulative Data Services (Monthly)**

**Both**

- Each MDMA shall be required to submit a written application to the LDC with which it is requesting MDMA approval.
- Each MDMA applicant with an executed ESP agreement with the LDC which it is requesting MDMA approval will receive priority.
- This MDMA approval will be granted to MDMA agents which possess the ability to perform these functions as outlined by the three LDCs in the December MDMA Workshops.
- The approval is based on the review of the written application, completed documents and a Data Management Acceptance Test.
- Upon request from the MDMA applicant & submission of application, the LDC will electronically forward a copy of the Data Management Acceptance Test.

**\* \* The written application shall include:**

- A completed written application, including the name and address of the MDMA.
  - A completed approval checklist
  - A description of MDMA applicant's experience in meter reading & meter data management.
  - A list of current customers receiving the relevant MDMA service.
- **Meter Reading Training Program/Manuals, including but not limited to the following:** (Check all that apply)

- ☐ Safety
- ☐ Meter Reader Work Practices & Job Description
- ☐ Security
- ☐ Meter Reading Training Guide (e.g. Meter Pro License)
- ☐ Hand held device training manual
- ☐ Uniform & equipment
- ☐ Performance Responsibilities
- ☐ Vehicle Insurance
- ☐ Customer Relations
- ☐ Additional documentation and/or manuals related to meter reading
- ☐ Hiring Practices & Criteria
- ☐ Subcontractor list, if applicable

• **Meter Data Management Agent Training Curriculum & Operational Procedures, including but not limited to the following:** (Check all that apply) If the required information identified in the Acceptance package is not included in the documents listed below, please include the document or describe how the requirement is being met.

- ☐ Hiring Practices
- ☐ Position Descriptions
- ☐ Training Curriculum
- ☐ Operational Procedures (Sample)
- ☐ Disaster Recovery
- ☐ Availability/Security
- ☐ Operations/System Description

• **Successful completion of the Data Management Acceptance Test will include, but not be limited to the following:**

- Input & output data will be matched to the test questions using the MEPMD01 records as defined in the CMEP.
- VEE data must be produced through automated means that provide a systematic & consistent set of results.
- Include proper use of flags for estimation, adjusted, etc.
- If data is manipulated manually, the MDMA must document the procedures that it has implemented to ensure consistency.
- Notify the LDC at \_\_\_\_\_ - when test data are available on MDMA server.
- Written responses to data test should be submitted via e-mail addressed to: \_\_\_\_\_.

End of application