

## **Instructions On Qualifying As A Meter Data Management Agent (MDMA)**

### ***Background***

The CPUC Decision on the Meter and Data Communication Standards Workshop Report of December 3, 1997, directed the UDC's to develop a Meter Data Management Agent qualification/approval process for those ESPs and MDMA's who wish to offer MDMA services.

The CPUC requires that potential MDMA's comply with current UDC 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 Approval" (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:

Pacific Gas and Electric Company  
ESP Services  
N8C  
P.O. Box 770000  
San Francisco, California 94177

The UDC's will review the submitted documentation of this test, determine if the potential MDMA is compliant with the UDC's standards, and notify the MDMA via e-mail. The UDC's have established a goal of 10 business days to review the documentation and respond to the potential MDMA.

Omitted documentation of the submitted written requirements will result in the UDC requesting that additional information. If it is deemed after the UDC'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.

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**(MDMA)*****Server Acceptance Test***

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

The UDC 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 Electronic Data Interchange (EDI) format; post the data to the potential MDMA's server; and provide the UDC with access to the server. Detailed steps are outlined in the MDMA Server Acceptance Testing document .

The acceptance test is then performed. The UDC'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 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 UDC is included in this package as an Appendix.

***Security and Confidentiality***

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

***Help Desk***

The CPUC decision requires that a technical help desk be provided by the UDC's as well as MDMA's. Each UDC have toll free numbers available. The potential MDMA's must provide a technical support number as well. 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.

<b>APPLICATION FOR MDMA APPROVAL</b>
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**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.

**If this application is approved by a UDC, the MDMA is not authorized to provide MDMA services except on behalf of an Energy Services Provider (ESP) who is duly authorized to provide direct access services in a UDC service territory under a UDC's direct access tariffs and a valid ESP Service Agreement.**

**By signing this agreement the applicant agrees to keep confidential all data transmitted to it by the UDC 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:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

**SIGNATURE:** \_\_\_\_\_ **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 UDC with which it is requesting MDMA approval.
- Each MDMA applicant with an executed ESP agreement with the UDC 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 UDCs in the December 3, 1997 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 UDC 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.
- **Meter Reading Training Program/Manuals, including but not limited to the following:** (Check all that apply)
 

<input type="checkbox"/> Safety	<input type="checkbox"/> Meter Reader Work Practices & Job Description
<input type="checkbox"/> Security	<input type="checkbox"/> Meter Reading Training Guide (e.g. MeterPro License)
<input type="checkbox"/> Hand held device training manual	<input type="checkbox"/> Uniform & equipment
<input type="checkbox"/> Performance Responsibilities	<input type="checkbox"/> Vehicle Insurance
<input type="checkbox"/> Customer Relations	<input type="checkbox"/> Additional documentation and/or manuals related to meter reading
<input type="checkbox"/> Hiring Practices & Criteria	<input type="checkbox"/> 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.
 

<input type="checkbox"/> Hiring Practices	<input type="checkbox"/> Position Descriptions
<input type="checkbox"/> Training Curriculum	<input type="checkbox"/> Operational Procedures (Sample)
<input type="checkbox"/> Disaster Recovery	<input type="checkbox"/> Availability/Security
<input type="checkbox"/> 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 field “Receiver customer ID” with the following format: MDMATESTnn where nn=test question number
  - ⇒ VEE data must be produced through automated means that provide a systematic & consistent set of results.
  - ⇒ If data are manipulated manually, the MDMA must document the procedures that it has implemented to ensure consistency.
  - ⇒ Notify Jackie Ortega at (415) 973-8030 when ready to begin MDMA VEE data test
  - ⇒ Written responses to data test should be submitted in an e-mail addressed to:

Jackie Ortega (415) 973-8030, [JMO5@pge.com](mailto:JMO5@pge.com).

For additional information, refer questions to:

Jackie Ortega  
(415) 973-8030, [JMO5@pge.com](mailto:JMO5@pge.com)  
Or  
Kathy Follan  
(415) 973-6479, [KMF1@pge.com](mailto:KMF1@pge.com)