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**SMART METER**  
**— TEXAS —**  
**Customer User Guide**

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## 1 Welcome to Smart Meter Texas

Welcome to Smart Meter Texas! From the Smart Meter Texas (SMT) web portal, you will be able to monitor your electricity usage by viewing data from your Smart Meter. To gain access to SMT, you must have:

- At least one installed Smart Meter (contact your Retail Electric Provider if you are not sure if you have a Smart Meter)
- A valid Electric Service Identifier (ESI ID)
- A valid Meter Number

You should be able to find your ESI ID and Meter Number on your electricity bill. If you have trouble locating that information, or if you are not sure if you have a Smart Meter installed, please contact your Retail Electric Provider.

Access the SMT website at: [www.SmartMeterTexas.com](http://www.SmartMeterTexas.com)

For additional help, contact the SMT Help Desk: (888) 616-5859

### 1.1 SMT Navigation

SMT screens use a standard layout consisting of navigation tabs across the top and a left navigation menu. Throughout this User Guide, you will see references about navigating to a tab or selecting from the left menu. The location of the tabs and left navigation menu are shown in Figure 1.

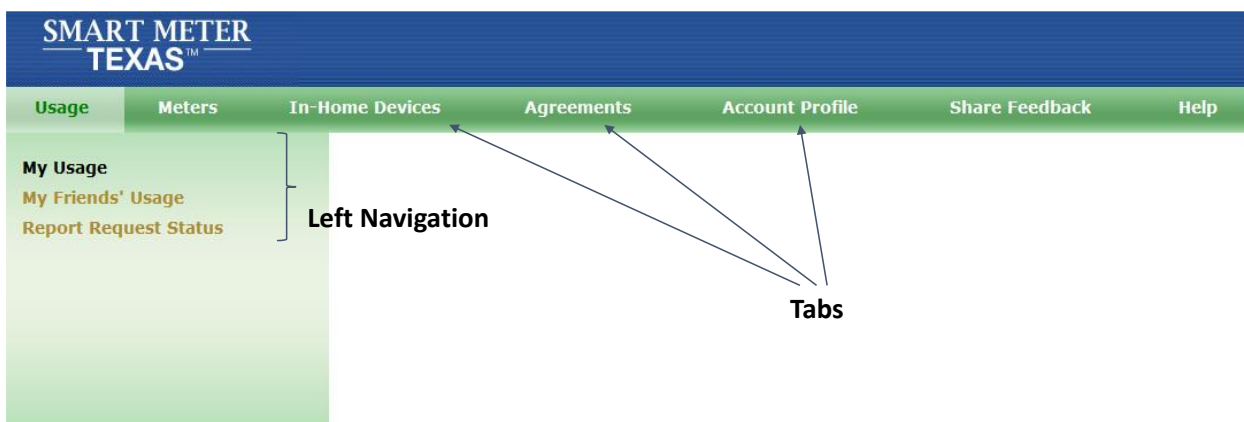


Figure 1: SMT Screen Layout

SMT has a large amount of content organized in hierarchical manner; therefore “breadcrumbs” (or “breadcrumb trail”) are utilized as a navigation tool that reveals the user’s location within a specific Left Navigation link and can be used to go back to any of the previous screens that were used to arrive to the current location. “Breadcrumbs” are horizontally arranged text links separated by the “slash” symbol (/).

In SMT, breadcrumbs offer a way to trace the path back to previous steps and the original landing point within a Left Navigation link. In SMT, you must use the “breadcrumbs” instead of the browser’s “back” button. An example of a breadcrumb is shown in Figure 2.

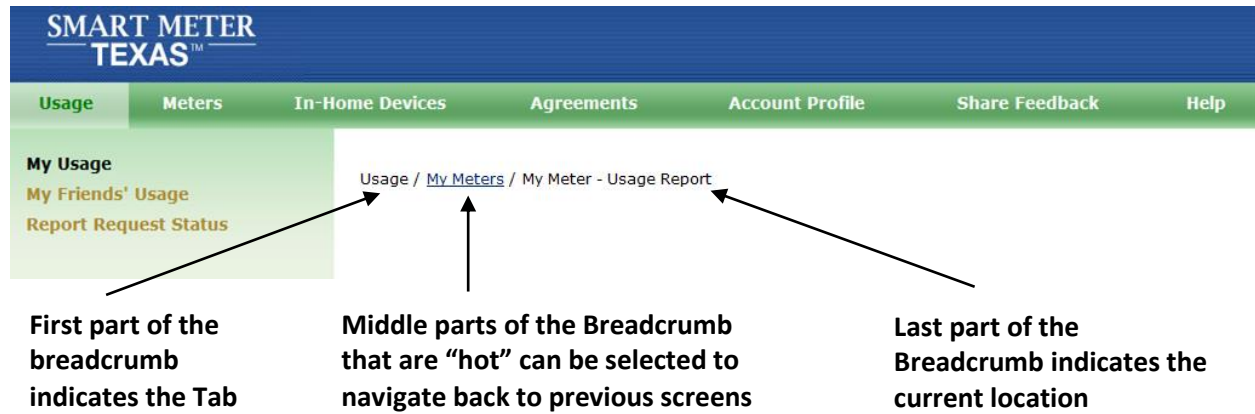


Figure 2: Breadcrumbs

## 1.2 Icons

SMT screens use icons to denote specific kinds of information.










SMT Icon Descriptions	
	Task has completed successfully.
	An error or problem has occurred and the task cannot be completed as requested.
	Warning – this situation could cause a problem in the future.
	Information about a situation is being presented.
	Help entry point. Clicking this icon will display page help for the current page.
	Calendar selection. Clicking this icon will display a calendar that can be used to select a specific date.
	Data is shown sorted in ascending order by this column.
	Data is shown sorted in descending order by this column.
	Special notes contained in this document.

Figure 3: SMT Icon Descriptions

### 1.3 System Requirements

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SMT System Requirements	
<i>Browser</i>	Internet Explorer (IE) 6.0 or higher Firefox 3.0 or higher
<i>Browser Options</i>	Cookies enabled Javascript enabled
<i>Display Resolution</i>	1024 x 768, for optimal screen display

Figure 4: SMT System Requirements

## 2 Getting Started – Registering for Smart Meter Texas (SMT)

Registering to use SMT is easy! But first, you must decide what type of account you would like to have.

**Residential Account:** Most customers will register for a Residential Account. From this type of account, you can view usage, meter, and premise information for your home and for other properties for which you are responsible. In addition, you can grant access to up to five (5) Friends to view your Usage Information.

**Business Account:** If you have a business and you would like for multiple business associates to have access to your Company’s usage, meter, and premise information; then you should register for a Business Account. You will be able to establish up to four (4) administrators who can grant and control access to your Company’s usage data.




**NOTE:** If you have Smart Meters for both your home and your business, you will need to have separate SMT accounts. If you have multiple Smart Meters installed in various geographic locations, you can, however, access usage data, meter, and premise information from a single SMT account. For example, from a Residential Account, you can access usage data for both your home in Dallas and for your rental property in Houston.

**Friend Account:** If a customer with a Residential Account invites you to see his Smart Meter’s Usage Information through SMT and you do not have a Residential Account you will need to create a Friend Account. For Information about how to create a Friend Account go to *Section 11.2 Registering for a Friend Account*.

### 2.1 Registering for a Residential Account

SMT Procedure – Registering for a Residential Account	
Step	Action
1	From your browser, go to the SMT website <a href="http://www.SmartMeterTexas.com">www.SmartMeterTexas.com</a>
2	Click ‘New User Register’ button
3	Click ‘Residential’ from the dropdown
4	<i>First Name</i> (required) Enter your first name.
5	<i>Middle Initial</i> Enter your middle initial.
6	<i>Last Name</i> (required) Enter your last name.

SMT Procedure – Registering for a Residential Account	
Step	Action
7	<p><i>Suffix</i></p> <p>Enter any name suffix (Jr, Sr or, III).</p>
8	<p><i>Phone</i></p> <p>Enter your preferred contact phone number.</p>
9	<p><i>Email Address (required)</i></p> <p>Enter your preferred email address. When registration is complete, your temporary password will be sent to this email address.</p>
10	<p><i>Re-enter Email Address (required)</i></p> <p>This entry must exactly match the previous entry for <i>Email Address</i>.</p>
11	<p><i>Language Preference (required)</i></p> <p>Select your preferred language. SMT currently supports both English and Spanish languages for Residential Accounts. The default language preference is English.</p>
12	<p><i>User ID (required)</i></p> <p>Create a User ID for your Account. User ID must be at least 5 and no more than 100 characters in length and cannot contain slashes (/), single quote marks (') or double quote marks ("). User IDs are not case sensitive.</p>
13	<p><i>Your Current Retail Electric Provider (required)</i></p> <p>You must enter the name of your current Retail Electric Provider (REP) in order to complete the Registration process.</p> <p>You may use the link on the right to Search for your REP. A new window will pop up for you to find your REP. You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: abc*, a*bc, or *abc).</p> <p>abc* shows all REP names that begin with 'abc'</p> <p>a*bc shows all REP names that begin with 'a' and end with 'bc'</p> <p>*abc shows all REP names that end with 'abc'</p> <p>You can only use one wildcard/asterisk in a given search. Pick your REP from the list and click the 'Select' button. Click the 'Cancel' button to go back without selecting a REP from the search.</p> <p> <b>NOTE:</b> If you are not able to find a match of the name from the list, contact your Retail Electric Provider.</p>


SMT Procedure – Registering for a Residential Account	
Step	Action
14	<p><i>ESI ID</i> (required)</p> <p>You must enter a valid ESI ID and Meter Number for one Smart Meter in order to complete the Registration process. You may enter a full ESI ID (17 characters) or the last 9 characters only.</p> <p>You will be able to add additional Smart Meters to your Account after you have successfully registered. You should be able to find your ESI ID on your electricity bill. If you need help, contact your Retail Electric Provider.</p> <p> <b>NOTE:</b> If you have more than one (1) Smart Meter, it is recommended that you use the one you want to view most frequently when you register. The Smart Meter you provide will become the Default Meter. Usage information from the Default Meter will be displayed automatically when you login to your Account.</p>
15	<p><i>Meter Number</i> (required)</p> <p>You must enter a valid ESI ID and Meter Number for one Smart Meter in order to complete the Registration process. You will be able to add additional Smart Meters to your Account after you have successfully registered. You should be able to find your Meter Number on your electricity bill. If you need help, contact your Retail Electric Provider.</p>
16	<p><i>Terms and Conditions</i> (required)</p> <p>You must agree to the stated Terms and Conditions in order to access SMT.</p>
17	<p>Click 'Create Account'</p> <p>If all required fields have been entered successfully, a confirmation will be displayed. You will receive an email notice that will contain the temporary password for your Account.</p>

Figure 5: SMT Procedure – Registering for a Residential Account

## 2.2 Registering for a Business Account


Business Accounts must have at least one (1) and no more than four (4) administrators. Administrators grant and control access to your Company's usage, meter and premise information. You must create one Administrator Account when you create your Company Account. Other Administrators and Users may register for access to your existing Company and must be approved by an existing Administrator of your Company. For more information on the capabilities of Administrators and Users, see *Section 4.1 Users vs. Administrators*.





**NOTE:** New registrants need to be able to locate your Company by company name.

## 2.2.1

## Creating a New Business Account

SMT Procedure – Creating a New Business Account	
Step	Action
1	From your browser, go to the SMT website <a href="http://www.SmartMeterTexas.com">www.SmartMeterTexas.com</a>
2	Click 'New User Register' button
3	Click 'New Business' from the dropdown
4	<i>Company Name</i> (required) Enter your Company name.
5	<i>Address 1</i> (required) Enter the primary address for your Company.
6	<i>Address 2</i> Enter a second line of address for your Company.
7	<i>City</i> (required) Enter the city for your Company address.
8	<i>State</i> (required) Select the state for your Company address from the dropdown box. The default state is TX (Texas).
9	<i>Zip Code</i> (required) Enter the zip code for your Company address.
10	<i>Country</i> (required) Select the country for your Company address from the dropdown box. The default country is United States.
11	<i>Phone</i> (required) Enter the preferred contact phone number for your Company.
12	<i>Account Email Address</i> (required) Enter the preferred Company email address.   <b>NOTE:</b> SMT communication to your Administrators will be sent to this email address. You may want to consider establishing a shared mailbox for these communications. Communications will include SMT notices regarding activity for your Company (e.g., notification that your Administrators have pending Users waiting to be approved).

SMT Procedure – Creating a New Business Account	
Step	Action
13	<p><i>Re-enter Email Address (required)</i></p> <p>This entry must exactly match the previous entry for <i>Email Address</i>.</p>
14	<p><i>Your Current Retail Electric Provider (required)</i></p> <p>You must enter the name of your current Retail Electric Provider (REP) in order to complete the Registration process.</p> <p>You may use the link on the right to Search for your REP. A new window will pop up for you to find your REP. You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: abc*, a*bc, or *abc).</p> <p>abc* shows all REP names that begin with 'abc'</p> <p>a*bc shows all REP names that begin with 'a' and end with 'bc'</p> <p>*abc shows all REP names that end with 'abc'</p> <p>You can only use one wildcard/asterisk in a given search. Pick your REP from the list and click the 'Select' button. Click the 'Cancel' button to go back without selecting a REP from the search.</p> <p> <b>NOTE:</b> If you are not able to find a match of the name from the list, contact your Retail Electric Provider.</p>
15	<p><i>ESI ID (required)</i></p> <p>You must enter a valid ESI ID and Meter Number for one Smart Meter in order to complete the Registration process. You may enter a full ESI ID (17 characters) or the last 9 characters only.</p> <p>You will be able to add additional Smart Meters to your Company Account after you have successfully registered. You should be able to find your ESI ID on your electricity bill. If you need help, contact your Retail Electric Provider.</p> <p> <b>NOTE:</b> If your Company has more than one (1) Smart Meter, it is recommended that you use the one you want to view most frequently when you register. The Smart Meter you provide will become the Default Meter. Usage information from the Default Meter will be displayed automatically when you login to your Account.</p>
16	<p><i>Meter Number (required)</i></p> <p>You must enter a valid ESI ID and Meter Number for one Smart Meter in order to complete the Registration process. You will be able to add additional Smart Meters to your Company Account after you have successfully registered. You should be able to find your Meter Number on your electricity bill. If you need help, contact your Retail Electric Provider.</p>
17	Click 'Next' button



SMT Procedure – Creating a New Business Account	
Step	Action
18	<i>First Name</i> (required) You will be the first Administrator for your Company. Enter your first name.
19	<i>Middle Initial</i> Enter your middle initial.
20	<i>Last Name</i> (required) Enter your last name.
21	<i>Suffix</i> Enter any name suffix (Jr, Sr, III).
22	<i>Phone</i> Enter your preferred contact phone number.
23	<i>Email Address</i> (required) Enter your preferred email address. When registration is complete, your temporary password will be sent to this email address. As an Administrator, you will also receive copies of many of the email notifications that are sent to the Company Email Address, such as notification of registration requests that are pending approval by an Administrator.
24	<i>Re-enter Email Address</i> (required) This entry must exactly match the previous entry for Email Address.
25	<i>User ID</i> (required) Create a User ID for your Account. User ID must be at least 5 and no more than 100 characters in length and cannot contain slashes (/), single quote marks (') or double quote marks ("). User IDs are not case sensitive.
26	<i>Terms and Conditions</i> (required) You must agree to the stated Terms and Conditions in order to access SMT.
27	Click 'Finish' button If all required fields have been entered successfully, a confirmation will be displayed. You will receive an email notice that will contain the temporary password for your Account.

Figure 6: SMT Procedure – Creating a New Business Account

## 2.2.2

## Requesting Access to an Existing Business Account

SMT Procedure – Requesting Access to an Existing Business Account	
Step	Action
1	From your browser, go to the SMT website <a href="http://www.SmartMeterTexas.com">www.SmartMeterTexas.com</a>
2	Click 'New User Register' button
3	Click 'Existing Business' from the dropdown
4	<p><i>Type the Business Name</i></p> <p>Enter your Company Name.</p> <p>You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: abc*, a*bc, or *abc).</p> <p>abc* shows all Company Names that begin with 'abc'</p> <p>a*bc shows all Company Names that begin with 'a' and end with 'bc'</p> <p>*abc shows all Company Names that end with 'abc'</p> <p>You can only use one wildcard/asterisk in a given search.</p>
5	<p>Click 'Search' button</p> <p>OR</p> <p><i>Select a Letter to find the Business in the List</i></p> <p>Select a letter to display all company names that begin with that letter.</p>
6	<p><i>Select checkbox (required)</i></p> <p>Select the Company that you wish to access.</p>
7	Click 'Register as an Admin' button or 'Register as a User' button
8	<p><i>First Name (required)</i></p> <p>Enter your first name.</p>
9	<p><i>Middle Initial</i></p> <p>Enter your middle initial.</p>
10	<p><i>Last Name (required)</i></p> <p>Enter your last name.</p>
11	<p><i>Suffix</i></p> <p>Enter any name suffix (Jr, Sr, III).</p>

SMT Procedure – Requesting Access to an Existing Business Account	
Step	Action
12	<p><i>Phone</i></p> <p>Enter your preferred contact phone number.</p>
13	<p><i>Email Address (required)</i></p> <p>Enter your preferred email address. When registration is complete, your temporary password will be sent to this email address. If you will be an Administrator, you will also receive copies of many of the email notifications that are sent to the Company Email Address, such as notification of registration requests that are pending approval by an Administrator.</p>
14	<p><i>Re-enter Email Address (required)</i></p> <p>This entry must exactly match the previous entry for Email Address.</p>
15	<p><i>User ID (required)</i></p> <p>Create a User ID for your Account. User ID must be at least 5 and no more than 100 characters in length and cannot contain slashes (/), single quote marks (') or double quote marks ("). User IDs are not case sensitive.</p>
16	<p><i>Terms and Conditions (required)</i></p> <p>You must agree to the stated Terms and Conditions in order to access SMT.</p>
17	<p>Click 'Finish' button</p> <p>You will receive a confirmation screen. An email will be sent to the Administrators of the existing Company notifying them of your request. Your Account must be approved by one of the Company Administrators before you can access SMT. When you are approved or declined by a Company Administrator, you will receive notification via email. If approved, that email notice will contain the temporary password for your Account.</p>

Figure 7: SMT Procedure – Requesting Access to an Existing Business Account

### 3 Account Status

The status of your SMT Account changes when various actions are taken. Figure 8 describes the various Account Status values.




Account Status Values	
Pending	<p>You have successfully completed registration and your Account is pending approval by one of your Company Administrators.</p> <p> <b>NOTE:</b> This Status only occurs if you have registered for a Business Account and are requesting access to an existing Company. If you have registered for a Residential Account or you are setting up a Business Account for a new Company then your successful registration will automatically be approved.</p> <p> <b>NOTE:</b> If your Company Administrator declines your request or does not approve your request within 14 days, you will be notified by email and your registration request will be deleted. If this occurs, you must re-register.</p>
Approved	<p>You have successfully completed registration and all necessary approvals have been granted. A temporary password for your new Account has been sent to your email address but you have not yet logged in for the first time.</p> <p> <b>NOTE:</b> If you do not login within 14 days after receiving approval, you will be notified by email and your Account will be deleted. If this occurs, you must re-register.</p>
Active	<p>You have successfully logged in for the first time, changed your temporary password, and selected a security question for your Account.</p>
Locked	<p>You have exceeded the number of allowed login attempts with an incorrect password. To reset your Account, a new temporary password must be issued. When your new temporary password is issued, your Account Status will return to Active. See <i>Section 5.3 Forgot Password / Unlocking Your Account</i>.</p>
Suspended	<p>Your Account has been suspended by the SMT Team or, if you have a Business Account, by one of your Company Administrators. Your Smart Meters will remain associated with your Account. Your Account can only be re-instated by the SMT Team or by your Company Administrators. Once re-instated, your Account Status will return to Active.</p>
Revoked	<p>Your Account has been revoked by the SMT Team or, if you have a Business Account, by one of your Company Administrators. Any Smart Meters associated with your Account have been released. This action cannot be undone. To gain access to SMT, you must register for a new Account.</p>

Figure 8: Account Status Values

If you have a Business Account, your Company also carries a status. Both your Account Status and your Company Status must be Active for you to gain access to SMT. Figure 9 describes the various Company Status values.



Company Status Values	
Approved	<p>Your Company's first Administrator has successfully registered. A temporary password for the first Administrator Account has been sent to the email address provided but the Administrator has not yet logged in for the first time.</p> <p> <b>NOTE:</b> If the first Administrator does not login within 14 days after receiving approval, email notification will be sent and the Company and first Administrator Account will be deleted. If this occurs, you must re-register.</p>
Active	<p>The first Administrator has successfully logged in for the first time.</p> <p> <b>NOTE:</b> The Company Status must be Active in order for others to register for a Business Account requesting access to your Company.</p>
Suspended	<p>Your Company has been suspended by the SMT Team. When this occurred, an email notification was sent to the email address listed in your Company Profile. Your Smart Meters will remain associated with your Company. Your Company can only be re-instated by the SMT Team. Once re-instated, your Company Status will return to Active.</p>
Revoked	<p>Your Company has been revoked by the SMT Team. Any Smart Meters associated with your Company have been released. Any Business Accounts for Users or Administrators for your Company have also been revoked. This action cannot be undone. To gain access to SMT, you must set up a new Company and register for a new Account.</p>

Figure 9: Company Status Values

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## 4 Managing Accounts for Your Company

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If you have a Business Account and are an Administrator for your Company, you are responsible for managing access to your Company data. Managing access includes approving and declining access requests as well as maintaining access of existing Accounts.

Anyone can request access to your Company Account but approval must be granted by one of the Company Administrators. New registrants will request access as either a User or an Administrator.

For additional information on Account and Company Status values, see *Section 3 Account Status*.

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### 4.1 Users vs. Administrators

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Company Users can:

- Update their own personal profile
- View the Company profile
- Access usage, meter, and premise information for the Smart Meters that are associated with your Company
- View, add, and remove In-Home Devices for the Smart Meters that are associated with your Company if your Company Administrator has granted you In-Home Devices authorization
- View Third-Party Agreements associated with your Company.

Company Administrators can:


- Update their own personal profile
- Update the Company profile
- Add and remove Smart Meters for your Company
- Access usage, meter, and premise information for the Smart Meters that are associated with your Company
- View, add, and remove In-Home Devices for the Smart Meters that are associated with your Company
- Approve/decline new registrations requesting access to your Company
- Suspend/re-instate/revoke Accounts that have previously been granted access to your Company
- View Third-Party Agreements associated with your Company
- Accept, reject, extend and terminate Third-Party Agreements associated with your Company.

## 4.2 Approving and Declining New Account Requests

When a person registers for a Business Account and requests access to your Company, that request must be approved or declined by one of the Company Administrators. Email notification is sent to the email address in the Company Profile whenever a registration request occurs.



**NOTE:** If a Company Administrator does not take action on a pending registration request within 14 days, the requestor will be notified by email and the registration request will be deleted. If this occurs, the requestor must re-register.

SMT Procedure – Approving and Declining New Account Requests	
Step	Action
1	Navigate to the 'Account Profile' tab
2	Select 'Pending Approvals' from the left menu
3	<p><i>Select checkbox</i> (required)</p> <p>Select the checkbox next to one or more Accounts. Edit Permissions is only available for one Account at a time. Approve and Decline will function for multiple Accounts at the same time.</p>
4	<p>Click 'Edit Permissions' button, 'Approve' button, or 'Decline' button</p> <p><b>Edit Permissions</b> will display the Account Profile information for the Pending Account. You will be able to approve or decline this Account from the Edit Permissions screen. <a href="#">Go to Step 5.</a></p> <p><b>Approve</b> will approve all selected Accounts without viewing the Account owner's details</p> <p> <b>NOTE:</b> If you wish to include comments that will be sent to the Account owner upon approval, then you must approve the Account through the Edit Permissions screen.</p> <p><b>Decline</b> will require you to enter comments to be sent to the registrant about why the request is being declined. <a href="#">Go to Step 9.</a></p>



SMT Procedure – Approving and Declining New Account Requests	
Step	Action
5	<p><b>From Step 4 / Edit Permissions</b></p> <p><i>Add and Remove In-Home Devices (optional)</i></p> <p>Select this checkbox if you wish to grant this user access to Add and Remove HAN Devices. All administrators have In-Home Device rights by default.</p> <p> <b>NOTE:</b> If you approve a user without Editing Permissions (see Step 4) by default the user will not have access to Add and Remove In-Home Devices. However, you may edit the user’s permissions later through the option ‘Manage Users’ (for more information see <i>Section 4.4 Altering Account Status for Existing Accounts</i>).</p>
6	<p><i>Web Portal Access (required)</i></p> <p>Select ‘Approve’ or ‘Decline’ from the dropdown box.</p>
7	<p><i>Comments (required if the Account is being declined)</i></p> <p>The Account owner will be notified via email when the Account is approved or declined. Any comments entered here are included in that email. If the Account is being approved, the comments are optional.</p>
8	<p>Click ‘Save Account’ button</p> <p>If the Account was approved, the Account Status will change to ‘Approved’ and an email notification will be sent to the Account owner along with a temporary password. If the Account was declined, the Account will be deleted and an email notification will be sent to the Account owner. Either way, the Pending Request is removed from the Administrator’s pending work queue.</p> <p> <b>NOTE:</b> The Company Administrators share the Administrator’s pending work queue. If any one (1) Administrator approves or declines a registration request, the request is removed from the Administrator’s pending work queue for all Company Administrators.</p>
9	<p><b>From Step 4 / Decline</b></p> <p><i>Comments (required)</i></p> <p>The Account owner will be notified via email when the Account is declined. Comments entered here are included in that email and are meant to give the Account owner a reason why the request was declined.</p>
10	<p>Click ‘Decline’ button</p> <p>All Accounts selected on the pending work queue will be deleted. An email notification will be sent to each of the Account owners. The Pending Request is removed from the Administrator’s pending work queue.</p>

Figure 10: SMT Procedure – Approving and Declining New Account Requests



### 4.3 Displaying Your Company's Account List

If you are a Company Administrator, your Company's Account List contains all of the Accounts that are associated with your Company. Figure 11 shows an example of an Account list when displayed in SMT.

	User ID	First Name	Last Name ▼	Email	Type	Account Status
<input type="checkbox"/>	jdoe	Jane	Doe	jdoe@company.com	User	Active
<input type="checkbox"/>	ssmith	Steve	Smith	ssmith@company.com	User	Active

Figure 11: Account List

If you have 25 or fewer Accounts associated with your Company, your Account List will automatically display. If you have more than 25 Accounts, you will need to search for Accounts to display in your list.

SMT Procedure – Displaying Your Account List (25 or fewer Accounts)	
Step	Action
1	Navigate to the 'Account Profile' tab
2	Select 'Manage Users' from the left menu

Figure 12: SMT Procedure – Displaying Your Account List (25 or fewer Accounts)

If you have 25 or more Accounts associated with your Company, you will see a Search screen. You must search for a specific Account or a group of Accounts to populate the search results with an Account List. You may also click the link 'Show All' to display all Accounts associated with your Company.



**NOTE:** If you have more than 500 Accounts associated with your Company, the 'Show All' link will not appear. In this case, you must search for a specific Account or group of Accounts. If visible, you may click the link 'Show All' to populate your Account List.

SMT Procedure – Displaying Your Account List (Show All)	
Step	Action
1	Navigate to the 'Account Profile' tab
2	Select 'Manage Users' from the left menu
3	Click 'Show All' link






Figure 13: SMT Procedure – Displaying Your Account List (Show All)

SMT Procedure – Displaying Your Account List ( <i>Search for Accounts</i> )	
Step	Action
1	Navigate to the 'Account Profile' tab
2	Select 'Manage Users' from the left menu
	<p>Enter search criteria in one (1) or more of the following fields. In each search field, you may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: abc*, a*bc, or *abc).</p> <p>abc* shows all entries that begin with 'abc'</p> <p>a*bc shows all entries that begin with 'a' and end with 'bc'</p> <p>*abc shows all entries that end with 'abc'</p> <p>You can only use one wildcard/asterisk in a given search field.</p>
3	<p><i>First Name</i></p> <p>Enter the First Name on the Account to be located.</p>
4	<p><i>Last Name</i></p> <p>Enter the Last Name on the Account to be located.</p>
5	<p><i>Email Address</i></p> <p>Enter the Email Address on the Account to be located.</p>
6	<p><i>User ID</i></p> <p>Enter the User ID on the Account to be located.</p>
7	<p><i>Account Status</i></p> <p>Select an Account Status from the dropdown list. Your search results will include only Accounts with the selected status. For more information on Account Status values, see <i>Section 3 Account Status</i>.</p>
8	<p>Click 'Search' button</p> <p>OR</p> <p><i>Select a Letter to find the user's last name in the list</i></p> <p>Select a letter to display all Accounts with Last Names that begin with that letter.</p>

Figure 14: SMT Procedure – Displaying Your Account List (*Search for Accounts*)

#### 4.4 Altering Account Status for Existing Accounts

Company Administrators can alter the Account Status for any User or Administrator Account that is associated with the Company. For more information on Account Status values, see *Section 3 Account Status*.

SMT Procedure – Altering Account Status for Existing Accounts	
Step	Action
	 <b>NOTE:</b> You must have an Account List displayed before you can complete these steps. For information on displaying your Account List, see <i>Section 4.3 Displaying Your Company's Account List</i> .
1	<p><b>Select checkbox</b> (required)</p> <p>Select the checkbox next to one or more Accounts. Edit User is only available for one Account at a time. Suspend, Reinstate, and Revoke function for multiple Accounts at the same time.</p>
2	<p>Click 'Edit User' button, 'Suspend' button, 'Reinstate' button, or 'Revoke' button</p> <p><b>Edit User</b> will display the Account Profile information for the selected Account. You will be able to change the status of the Account from the Edit User screen. <a href="#">Go to Step 3.</a></p> <p><b>Suspend</b> will require you to enter comments to be sent to the Account owner about why he is being suspended.</p> <p> <b>NOTE:</b> You cannot suspend an Account that is already Suspended or Revoked. <a href="#">Go to Step 7.</a></p> <p><b>Reinstate</b> will change the Account Status of selected Accounts to 'Active'.</p> <p> <b>NOTE:</b> Account Status must be Suspended in order to be reinstated.</p> <p> <b>NOTE:</b> If you wish to include comments that will be sent to the Account owner upon being reinstated, then you must alter the Account Status through the Edit User screen.</p> <p><b>Revoke</b> will require you to enter comments to be sent to the Account owner about why he is being revoked.</p> <p> <b>NOTE:</b> Revoking an Account is <b>permanent</b> and cannot be undone. <a href="#">Go to Step 7.</a></p>



SMT Procedure – Altering Account Status for Existing Accounts	
Step	Action
3	<p><b>From Step 2 / Edit User</b></p> <p><i>Add and Remove In-Home Devices (optional)</i></p> <p>Select this checkbox if you wish to grant this user access to Add and Remove In-Home Devices.</p>
4	<p><i>Web Portal Access (required)</i></p> <p>Select the access from the dropdown box.</p> <p> <b>NOTE:</b> The dropdown box values will differ depending on the Accounts current status. For example, Reinstate will not be shown as an option unless the current Account Status is Suspended.</p>
5	<p><i>Comments (required if the Account is being suspended or revoked)</i></p> <p>The Account owner will be notified via email when the Account Status is changed. Any comments entered here are included in that email.</p>
6	Click 'Save Account' button
7	<p><b>From Step 2 / Suspend or Revoke</b></p> <p><i>Comments (required)</i></p> <p>The Account owner will be notified via email when the Account Status is changed. Comments entered here are included in that email and are meant to give the Account owner a reason why the action was taken.</p>
8	<p>Click 'Suspend' button or 'Revoke' button</p> <p> <b>NOTE:</b> Only one of these buttons will show on your screen.</p> <p>All Accounts selected on the Account list will be suspended or revoked. An email notification will be sent to each of the Account owners.</p>

Figure 15: SMT Procedure – Changing Account Status for Existing Accounts

#### 4.5 Changing the Company Profile

Administrators may change the Company Profile information. Users may view but not change the Company Profile.

SMT Procedure – Changing the Company Profile	
Step	Action
1	Navigate to the 'Account Profile' tab


SMT Procedure – Changing the Company Profile	
Step	Action
2	Select 'Company Profile' from the left menu
3	Click 'Edit Profile' button
4	<i>Company Name</i> (required) Change your Company Name.
5	<i>Address 1</i> (required) Change the primary address for your Company.
6	<i>Address 2</i> Change the second line of the address for your Company.
7	<i>City</i> (required) Change the city for your Company address.
8	<i>State</i> (required) Select a new state for your Company address from the dropdown box.
9	<i>Zip Code</i> (required) Change the zip code for your Company address.
10	<i>Country</i> (required) Select a new country for your Company address from the dropdown box.
11	<i>Phone</i> (required) Change the preferred contact phone number for your Company.
12	<i>Account Email Address</i> (required) Change the preferred Company email address.  <b>NOTE:</b> SMT communication to your Administrators will be sent to this email address. You may want to consider establishing a shared mailbox for these communications. Communications will include SMT notices regarding activity for your Company (e.g., notification that your Administrators have pending Users waiting to be approved).
13	<i>Re-enter Email Address</i> (required if <i>Account Email Address</i> is changed) This entry must exactly match the previous entry for <i>Account Email Address</i> .
14	Click 'Save Profile' button

Figure 16: SMT Procedure – Changing the Company Profile

## 5 Managing Your Personal Account

The personal information that you entered when you registered is stored in your profile. The SMT Team or, if you have a Business Account, your Company Administrators can change the Status of your Account, but only you can alter your personal profile information.

For more information on Account Status, see *Section 3 Account Status*.

You also have the ability to unlock your own Account and to recover forgotten User IDs or Passwords.

### 5.1 Changing Your Password



SMT Procedure – Changing Your Password	
Step	Action
1	Navigate to the 'Account Profile' tab
2	Select 'My Profile' from the left menu
3	Click 'Change Password' button
4	<i>Current Password</i> (required) Enter your current password.
5	<i>New Password</i> (required) Enter your new password. Your password must be between 6 and 24 characters. The field is case sensitive and cannot be the same as your User ID. Your new password cannot be the same as your previous password.
6	<i>Re-enter New Password</i> (required) This entry must exactly match the previous entry for <i>New Password</i> .
7	Click 'Save Password' button

Figure 17: SMT Procedure – Changing Your Password

### 5.2 Changing Your Personal Profile



**NOTE:** You cannot change your User ID. If you need a different User ID then you will have to register for a new Account. If you have a Residential Account, you must first remove the Smart Meters associated with your old Account so that they will be available for adding to your new Account.

SMT Procedure – Changing Your Personal Profile	
Step	Action
1	Navigate to the 'Account Profile' tab
2	Select 'My Profile' from the left menu
3	Click 'Edit Profile' button
4	<i>First Name</i> (required) Change your first name.
5	<i>Middle Initial</i> Change your middle initial.
6	<i>Last Name</i> (required) Change your last name.
7	<i>Suffix</i> Change any name suffix (Jr, Sr, III).
8	<i>Phone</i> Change your preferred contact phone number.
9	<i>Email Address</i> (required) Change your preferred email address.
10	<i>Re-enter Email Address</i> (required if <i>Email Address</i> is changed) This entry must exactly match the previous entry for <i>Email Address</i> .
11	<i>In-Home Devices: Add and Remove In-Home Devices (Business Accounts only)</i>  This is a display-only field. It shows whether you have In-Home Device authorization. If you have In-Home Device Authorization the checkbox will be selected.   <b>NOTE:</b> If you have a Residential Account you have In-Home Device Authorization by default, therefore this field is not shown in your Profile.
12	<i>Language Preference</i> (required for Residential Accounts)  Change your preferred language. SMT currently supports both English and Spanish languages for Residential Accounts. This field is not available if you have a Business Account.   <b>NOTE:</b> After changing your Language Preference and saving your Profile, you must logoff and log back in to see screens in your new preferred language.

SMT Procedure – Changing Your Personal Profile	
Step	Action
13	<p>Click ‘Change Password’ button, ‘Change Security’ button or ‘Save Profile’ button</p> <p><b>Change Password</b> will display a new screen that will allow you to change your password. <a href="#">Go to Step 14.</a></p> <p><b>Change Security</b> will display a new screen that will allow you to change your Security Question and Answer. <a href="#">Go to Step 18.</a></p> <p><b>Save Profile</b> will save all changes that you have made to your Account Profile</p>
14	<p><a href="#">From Step 13 / Change Password</a></p> <p><i>Current Password</i> (required)</p> <p>Enter your current password.</p>
15	<p><i>New Password</i> (required)</p> <p>Enter your new password. Your password must be between 6 and 24 characters. The field is case sensitive and cannot be the same as your User ID.</p>
16	<p><i>Re-enter New Password</i> (required)</p> <p>This entry must exactly match the previous entry for <i>New Password</i>.</p>
17	<p>Click ‘Save Password’ button</p> <p>Your password is changed and you are returned to the Edit Profile screen. <a href="#">Return to Step 13.</a></p>
18	<p><a href="#">From Step 13 / Change Security</a></p> <p><i>Security Question</i> (required)</p> <p>Select a Security Question from the dropdown box.</p>
19	<p><i>Security Question Answer</i> (required)</p> <p>Enter an Answer for the Security Question that you can remember. The Answer is not case sensitive. In the future, if you forget your password, you will be asked for the Answer to your Security Question.</p>
20	<p>Click ‘Save Question’ button</p> <p>Your security information is changed and you are returned to the Edit Profile screen. <a href="#">Return to Step 13.</a></p>

Figure 18: SMT Procedure – Changing Your Personal Profile

### [5.3 Forgot Password / Unlocking Your Account](#)



If you forget your password, you can request that a new temporary password be generated for your Account.

If you attempt to login with an incorrect password more than 4 times, your Account Status will be set to 'Locked'. You can also use the Forgot Password procedure to unlock your Account and reset your password. For more information on Account Status, see *Section 3 Account Status*.


SMT Procedure – Forgot Password / Unlocking Your Account	
Step	Action
1	From your browser, go to the SMT website <a href="http://www.SmartMeterTexas.com">www.SmartMeterTexas.com</a>
2	<i>User ID</i> (required) Enter your User ID in the Login area.
3	Click 'Forgot Password' link Your <i>Security Question</i> from your Account Profile will be displayed.
4	<i>Answer</i> (required) Enter the answer to the displayed security question. The answer must match the <i>Security Question Answer</i> from your Account Profile.
5	Click 'Submit' button  If the answer to your security question is correct, a new temporary password will be generated and sent to the <i>Email Address</i> that is contained in your Account Profile. If your Account was locked, then your Account Status will be set to 'Active'.   <b>NOTE:</b> If you no longer have access to the <i>Email Address</i> that is listed in your Account Profile and you cannot retrieve your new temporary password, then you must register for a new Account.

Figure 19: SMT Procedure – Forgot Password / Unlocking Your Account

## 5.4 Forgot User ID

If you forget your User ID, you can request that it be sent to the Email Address in your Account Profile.

SMT Procedure – Forgot User ID	
Step	Action
1	From your browser, go to the SMT website <a href="http://www.SmartMeterTexas.com">www.SmartMeterTexas.com</a>
2	Click 'Forgot User ID' link


SMT Procedure – Forgot User ID	
Step	Action
3	<p><i>Email Address</i> (required)</p> <p>Enter the Email Address that is stored in your Account Profile.</p>
4	<p>Click ‘Submit’ button</p> <p>If an Account is found that matches the <i>Email Address</i> entered, then an email containing the User ID will be sent to that <i>Email Address</i>. If multiple Accounts are found, then the email notification will list all User IDs associated with that email address.</p> <p> <b>NOTE:</b> If you no longer have access to the Email Address that is listed in your Account Profile and you cannot retrieve your forgotten User ID, then you must register for a new Account.</p>

Figure 20: SMT Procedure – Forgot User ID

## 5.5 Changing Your Account Authorization Code

Your Account Authorization Code is a security feature ensuring that you only receive new Third-Party Agreement Invitation emails from Third-Party Service Providers authorized by you.

You may provide the Third-Party Service Provider your current Account Authorization Code if you want to be sent a Third-Party Agreement Invitation. The Third-Party Service Provider may request access to:

- View and export usage data, meter, premise information and perform On-Demand Read requests of your Smart Meters
- Add and remove In-Home Devices to your Smart Meters
- Send text messages, price information and load control events to your In-Home Devices

If you are the Administrator of a Business account or you have a Residential account, SMT will generate an Account Authorization Code at the time you complete the registration process.

You can change your Account Authorization Code at any time. Third-Party Service Providers who were given the previous code will not be allowed to send you new Agreement Invitations after you change the Account Authorization Code.



**NOTE:** Changing your Account Authorization Code will not affect the Third-Party Agreement Invitations you received prior to the change. You can still accept or reject these pending invitations after you have changed your Account Authorization Code.

SMT Procedure – Changing Your Account Authorization Code	
Step	Action
1	Navigate to the 'Account Profile' tab
2	Select 'My Profile' from the left menu
3	Click 'Manage Account Authorization' button
4	<i>Enter new Account Authorization Code</i> Enter a new code. You cannot use your existing password or code.
5	Click 'Save Change' button Your new Account Authorization Code is changed and you will return to the My Profile screen.

Figure 21: SMT Procedure – Changing Your Account Authorization Code

## 6 Managing Smart Meters

### 6.1 Displaying Your Meter List – My Meters

Your Meter List contains all of the Smart Meters that are associated with your Account. Figure 22 shows an example of a Meter List when displayed in SMT.

	Description▼	Service Address▼	City▼	State▼	ESI ID▼	Meter Number▼
<input type="checkbox"/>	Cool Meter	1234 TEST DR	HOUSTON	TX	99999990000000459	12345876
<input type="checkbox"/>	Cool Meter 2	4321 TEST DR	DALLAS	TX	99999990000009054	67854321

Figure 22: Meter List – My Meters

If you have 25 or fewer Smart Meters associated with your Account, your Meter List will automatically display. If you have more than 25 Smart Meters, you will need to search for meters to display in your list.

SMT Procedure – Displaying Your Meter List (25 or fewer Smart Meters)	
Step	Action
1	Navigate to the ‘Meters’ tab
2	Select ‘My Meters’ from the left menu

Figure 23: SMT Procedure – Displaying Your Meter List (25 or fewer Smart Meters) – My Meters

#### 6.1.1 Searching for Meters – My Meters

If you have more than 25 Smart Meters associated with your Account, you will see a Search screen. You must search for a specific Smart Meter or a group of Smart Meters to populate the search results with a Meter List. You may also click the link ‘Show All’ to display all the Smart Meters associated with your Account.



**NOTE:** If you have more than 500 Smart Meters associated with your Account, the ‘Show All’ link will not appear. In this case, you must search for a specific meter or group of meters. A search can be performed on up to 100 meters or ESI Ds if you enter the values on the search page. If visible, you may click the link ‘Show All’ to populate your Meter List.

SMT Procedure – Displaying Your Meter List ( <i>Show All</i> )	
Step	Action
1	Navigate to the 'Meters' tab
2	Select 'My Meters' from the left menu
3	Click 'Show All' link

Figure 24: SMT Procedure – Displaying Your Meter List (*Show All*) – My Meters

SMT Procedure – Displaying Your Meter List ( <i>Search for Meters</i> )	
Step	Action
1	Navigate to the 'Meters' tab
2	Select 'My Meters' from the left menu
3	<i>Select type of meter identifier</i> (required) Select to search by either ESI ID or Meter Number
4	<i>Type one or more meter numbers</i> (required) Enter up to 100 ESI IDs or Meter Number (but not both) to correspond with your search type. Values should be separated by a comma (,). You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: 123*, 1*23, or *123). 123* shows all ESI IDs/Meter Numbers that begin with '123' 1*23 shows all ESI IDs/Meter Numbers that begin with '1' and end with '23' *123 shows all ESI IDs/Meter Numbers that end with '123' You can only use one wildcard/asterisk in a given search. If you use a wildcard, you may not enter other ESI IDs or meter numbers.
5	Click 'Search' button The Search will look for the specified meters among the Smart Meters that are associated with your Account.

Figure 25: SMT Procedure – Displaying Your Meter List (*Search for Meters*) – My Meters

## 6.1.2

### Search for Meters by Importing a File

If you routinely search for the same set of Smart Meters, you may find it beneficial to create a file containing your list of meter information. You can then import that file and search for your specific meters in a single step. The import file must be in a CSV (comma separated values) format and have a file type of CSV. There must be one (1) row of data for each Smart Meter. Each row will have only one

value that identifies your Smart Meter – either the ESI ID or the Meter Number. ESI IDs and Meter Numbers cannot be mixed in the same file. Following is an example of the format for an ESI ID file:

99999990000000116  
 99999990001234567  
 999999900000000789

Here is an example of the format for a Meter Number file:

900000116  
 900000123  
 200001987

For help creating a CSV file, see *Appendix A: Working with CSV Files*.



**NOTE:** SMT will reject files that contain trailing commas at the end of each row.

SMT Procedure – Search by Importing a File – My Meters – Meter and Premise Information	
Step	Action
1	Navigate to the ‘Meters’ tab
2	Select ‘My Meters’ from the left menu
3	<p><i>Select type of meter identifier</i> (required)</p> <p>Select to search by either ESI ID or Meter Number. All entries in the corresponding import file will be interpreted as this type of value.</p>
4	<p><i>Import Meter(s) from a file</i> (required)</p> <p>The file type must be CSV. Click ‘Browse’ to select the file from your computer. For help creating a CSV file, see <i>Appendix A: Working with CSV Files</i>.</p>
5	<p>Click ‘Import’ button</p> <p>Import the file and search for the designated meters in your Meter List. The results of your search will be consolidated in a file and the following message will appear in your Search Results:</p> <p><input type="checkbox"/> The information in your import file was used to search your Meter List. Select this Checkbox and Click on Export Information to use the search results to request Meter and/or Premise Information Reports.</p> <p>Selecting the checkbox will cause the Export Report function to create reports and export data for all of the Smart Meters that were successfully found. For information on exporting reports, see <i>Section 7.4 Exporting Reports</i>.</p>

Figure 26: SMT Procedure – Search by Importing a File – My Meters – Meter and Premise Information

## 6.2 Adding and Removing Smart Meters

If you have a Residential Account, you associated one (1) Smart Meter to your Account, by entering a valid ESI ID and Meter Number when you registered. If you have a Business Account, then a Smart Meter was associated with your Company when it was first setup. All Business Accounts automatically have access to all of the Smart Meters associated with the Company.

Once you are active in SMT, you can add additional Smart Meters or remove existing ones. If you have a Business Account, you must be an Administrator to add and remove Smart Meters for your Company.



**NOTE:** Adding and removing Smart Meters within SMT has no effect on your electricity account or your bill with your Retail Electric Provider and does not affect the flow of electricity. In SMT, you are simply associating Smart Meters to your SMT Account so that you can view the electricity usage captured by these meters.

The Smart Meter you or your Company Administrator provided during the new account registration is designated as the Default Meter of the Account. If you or your Company Administrator removes the Default Meter from your Account, the next Smart Meter you associated to your Account, based on the date and time the Smart Meter was added, will become the Default Meter.



**NOTE:** You cannot change the Default Meter through the portal. Contact the SMT Help Desk if you need help to identify which Smart Meter in your account is your current designated Default Meter.

Smart Meters you added to you SMT Account will automatically be added to your active Flexible Energy Data Agreement.

If you are a Residential Customer and you want to grant access to view your Smart Meter Usage Information to friends go to *Section 10 Managing My Friends* for information on how to invite friends to SMT. Once your friends are in SMT they do not obtain automatic access to a New Smart Meter after you Add it to your Account; you have to explicitly grant your friends access to your New Smart Meter; for more information go to *Section 10.3 Editing My Friend Agreement*.

### 6.2.1

#### Adding Smart Meters One at a Time

SMT Procedure – Adding Smart Meters One at a Time	
Step	Action
1	Navigate to the 'Meters' tab
2	Select 'My Meters' from the left menu
3	Click 'Add Smart Meter' button


SMT Procedure – Adding Smart Meters One at a Time	
Step	Action
4	<p><i>Description</i></p> <p>This field is only available to Residential Accounts. Enter an optional name for this Smart Meter that will help you remember where the meter is located, such as Home, Barn, or Vacation Home.</p>
5	<p><i>Your Current Retail Electric Provider (required)</i></p> <p>You must enter the name of your current Retail Electric Provider (REP) in order to complete the Registration process.</p> <p>You may use the link on the right to Search for your REP. A new window will pop up for you to find your REP. You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: abc*, a*bc, or *abc).</p> <p>abc* shows all REP names that begin with 'abc'</p> <p>a*bc shows all REP names that begin with 'a' and end with 'bc'</p> <p>*abc shows all REP names that end with 'abc'</p> <p>You can only use one wildcard/asterisk in a given search. Pick your REP from the list and click the 'Select' button. Click the 'Cancel' button to go back without selecting a REP from the search.</p> <p> <b>NOTE:</b> If you are not able to find a match of the name from the list, contact your Retail Electric Provider.</p>
6	<p><i>ESI ID (required)</i></p> <p>Enter a valid ESI ID for the meter to be added. You may enter a full ESI ID (17 characters) or the last 9 characters only.</p> <p>You should be able to find your ESI ID on your electricity bill. If you need help, contact your Retail Electric Provider.</p>
7	<p><i>Meter Number (required)</i></p> <p>Enter a valid Meter Number for the meter to be added. You should be able to find your Meter Number on your electricity bill. If you need help, contact your Retail Electric Provider.</p>
8	<p><i>Terms and Conditions (required)</i></p> <p>You must agree to the stated Terms and Conditions in order to access usage data from this Smart Meter in SMT.</p>
9	<p>Click 'Add Smart Meter' button</p> <p>The new meter will now show in your Meter List.</p>

Figure 27: SMT Procedure – Adding Smart Meters One at a Time



6.2.2

Adding Smart Meters by Importing a File


If you have several Smart Meters to add at one time, you may find it beneficial to create a file containing your list of meter information. You can then import that file and add your Smart Meters to SMT in a single step. The import file must be in a CSV (comma separated values) format and have a file type of CSV. There must be one (1) row of data for each Smart Meter. Each row will consist of an ESI ID followed by a comma (,) and then followed by a Meter Number. Following is an example of the format:

```
99999990000000116,900000116
99999990001234567,900000123
99999990000000789,200001987
```

For help creating a CSV file, see *Appendix A: Working with CSV Files*.



**NOTE:** SMT will reject files that contain trailing commas at the end of each row.

SMT Procedure – Adding Smart Meters by Importing a File	
Step	Action
1	Navigate to the ‘Meters’ tab
2	Select ‘My Meters’ from the left menu
3	Click ‘Import File’ button
4	<p><i>Select Current Retail Electric Provider (required)</i></p> <p>You must enter the name of your current Retail Electric Provider (REP) in order to complete the Registration process.</p> <p>You may use the link on the right to Search for your REP. A new window will pop up for you to find your REP. You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: abc*, a*bc, or *abc).</p> <p>abc* shows all REP names that begin with ‘abc’</p> <p>a*bc shows all REP names that begin with ‘a’ and end with ‘bc’</p> <p>*abc shows all REP names that end with ‘abc’</p> <p>You can only use one wildcard/asterisk in a given search. Pick your REP from the list and click the ‘Select’ button. Click the ‘Cancel’ button to go back without selecting a REP from the search.</p> <p> <b>NOTE:</b> If you are not able to find a match of the name from the list, contact your Retail Electric Provider.</p>

SMT Procedure – Adding Smart Meters by Importing a File	
Step	Action
5	<p><i>File Name</i> (required)</p> <p>Enter the name of the import file. The file type must be CSV. Optionally, Click 'Browse' to select the file from your computer. For help creating a CSV file, see <i>Appendix A: Working with CSV Files</i>.</p>
6	<p><i>Terms and Conditions</i> (required)</p> <p>You must agree to the stated Terms and Conditions in order to access usage data from these Smart Meters in SMT.</p>
7	<p>Click 'Import' button</p> <p>The new meters will now show in your Meter List. If invalid entries are found in your import file, the valid meters will still be added. In this situation, you will receive a warning that Import Errors have been encountered along with a link to a file containing error messages for those meters that could not be added.</p>

Figure 28: SMT Procedure – Adding Smart Meters by Importing a File

### 6.2.3

#### Errors When Adding a Smart Meter


You are certain that you have entered your ESI ID and Meter Number correctly, but your request to add the meter continues to fail.

- SMT only stores usage data from Smart Meters. You may need to verify with your Retail Electric Provider that you have a Smart Meter installed on your property.
- SMT only allows a Smart Meter to be associated with one (1) Account at a time.
- If you are still having problems, contact your Retail Electric Provider for resolution.

### 6.2.4

#### Creating or Changing the Smart Meter Description

If you have a Residential Account, you can add a description to each Smart Meter in your Meter List. The descriptions are not used by SMT but may help you remember the location of each of your Smart Meters. For example, you may choose to describe one meter as 'Home' and another as 'Barn'.

SMT Procedure – Creating or Changing the Smart Meter Description	
Step	Action
	<p><b>NOTE:</b> You must have a Meter List displayed before you can complete the remaining steps. For information on displaying your Meter List, see <i>Section 6.1 Displaying Your Meter List – My Meters</i>.</p>

SMT Procedure – Creating or Changing the Smart Meter Description	
Step	Action
1	<i>Select checkbox</i> (required) Select the checkbox next to the Smart Meter. You may only edit the description of one (1) Smart Meter at a time.
2	Click 'Edit Description' button
3	<i>Description</i> Enter a name to associate with this Smart Meter, such as Home, Barn, Vacation Home.
4	Click 'Save Changes' button

Figure 29: SMT Procedure – Creating or Changing the Smart Meter Description

## 6.2.5

## Removing a Smart Meter


If you no longer wish to monitor a specific Smart Meter, you may remove it from your Meter List. The Smart Meter will be removed from all your active Energy Data Agreements.



**NOTE:** Removing the Default Meter from your Account will not change the status of your Account.



**NOTE:** Removing Smart Meters within SMT has no effect on your electricity account or your bill with your Retail Electric Provider and does not affect the flow of electricity. In SMT, you are simply removing the association of a Smart Meter from your SMT Account. You will no longer be able to view the electricity usage captured by this meter. In addition, if you are a Residential Customer and you have granted access to view this Smart Meter's data to Friends, removing a Smart Meter removes the association from your Friends' accounts as well, they will no longer be able to view the electricity usage captured by this meter.

SMT Procedure – Removing a Smart Meter	
Step	Action
 <b>NOTE:</b> You must have a Meter List displayed before you can complete the remaining steps. For information on displaying your Meter List, see <i>Section 6.1 Displaying Your Meter List – My Meters</i> .	
1	<i>Select checkbox</i> (required) Select the checkbox next to one or more Smart Meters to be removed.
2	Click 'Remove Smart Meter' button A pop-up window will display asking if you really want to remove this meter.
3	Click 'OK'

**Figure 30: SMT Procedure – Removing a Smart Meter**

### 6.3 Effect of a Meter Change

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At some point, the Smart Meter on your property may need to be replaced by your electric utility. When that happens, the ESI ID for your Smart Meter will remain the same but your Meter Number will change. SMT is automatically notified when this happens.

If your original Smart Meter is replaced with a new Smart Meter then SMT will automatically change the Meter Number associated with your Account to reflect the current Meter Number. You will continue to have access to the usage data captured by your Smart Meter and your SMT service will be uninterrupted.

If your Smart Meter is replaced with a meter that is not a Smart Meter, your access to the usage data that was collected by your old Smart Meter will no longer be available via SMT.

If you have In-Home Devices provisioned to your Smart Meter, you will receive an email informing you that your Smart Meter has been replaced.

## 7 Creating Meter and Premise Information Reports

Information about your Meter and Premise is available in SMT for each of the Smart Meters associated with your Account or your Company's Account.



**NOTE:** Meter and Premise Information is only available for your Smart Meters. If you have a Friend Account you will not be able to view Meter and Premise Information for your Friend's Smart Meters, you may only view Usage Information.

### 7.1 Viewing Meter and Premise Information – Default Meter

If you only have one (1) Smart Meter associated with your Account, the meter or premise information for your Smart Meter will be displayed automatically when you go to the My Premise Information or My Meter Details screen. If you have more than one (1) Smart Meter associated with your Account, information displayed will be for the Default Meter.

SMT Procedure – Viewing Meter and Premise Information of Your Default Meter	
Step	Action
1	Navigate to the 'Meters' tab
2	Select 'My Premise Information' or 'My Meter Details' from the left menu
3	Position your mouse over each field name (the left column) in the List of Premise or Meter Information to see a brief description for that piece of information.

Figure 31: SMT Procedure – Viewing Meter and Premise Information for Your Default Meter



**NOTE:** If you do not have any Smart Meters associated with your Account at the time, you will be directed to your Meter List screen.

#### 7.1.1 Premise Information

When you select to view Premise Information you will be able to see the following for the selected Smart Meter:

Field Name	Brief Description
Electric Utility Company	Company that transmits and distributes electricity for this Smart Meter
ESI ID	Electric Service Identifier
Service Voltage	Voltage at the Premise (displayed if available)

Field Name	Brief Description
Premise Status	If the value is A or a, it means the Premise is active; if the value is I or i, it means that the Premise is inactive
Time Zone	The time zone where the premise is located
House Number	The House Number of the Service Address (displayed if available)
Fractional House Address	Designator that can be used to distinguish premises with the same address (displayed if available)
Leading Directional	The directional indicator (typically N, S, E, W) that precedes the street name (displayed if available)
Street Name	The street name for the service address
Street Type	The street type (e.g. St, Ave, Ln) for the premise address
Trailing Directional	The directional indicator that occurs after the street type (displayed if available)
Unit Designation	Denotes individual premises in multi-unit addresses, for example in apartment buildings (displayed if available)
City	The city or locality of the service address
State	The state of the service address
ZIP Code	The primary, five digit ZIP Code of the service address
Zip Code + 4	The secondary, four digit ZIP Code of the service address (displayed if available)
Meter Read Cycle	The cycle number corresponding to a meter read cycle date when data is reported for the monthly billing period
Load Profile	Describes the load profile at the service location as per ERCOT specifications
Rate Class/Code	Code that identifies the tariff used by the Electric Utility Company in billing this location (displayed if available)
AMS Profile Effective Date	Effective start date for SMT to start sending usage data to ERCOT (displayed if available)

Figure 32: Premise Information

## 7.1.2

## Meter Information

When you select to view Meter Information you will be able to see the following for the selected Smart Meter:

Field Name	Brief Description
Electric Utility Company	Company that transmits and distributes electricity for this Smart Meter
ESI ID	Electric Service Identifier
Meter Number	Manufacturer Serial Number of the Meter
Utility Meter Number	Meter Identifier used by the Electric Utility Company
kWh Meter Multiplier	A multiplying factor that is used to convert kWh readings to kWh consumption on certain (instrument rated) meters
Number of Channels	Number of Channels the Meter is Configured for
Meter Manufacturer Name	Company that manufactured the Meter
Last Meter Test Date	Last date the Meter was manually tested
Meter Class (Ampacity)	The maximum current (amperes) the meter can register continuously without creating an unsafe condition at the meter socket
Meter Installation Date	Date Meter was Installed
Meter Activation Date	Date when Meter started sending Usage Information to SMT
Technology/Communicator Indicator	Indicator of the type of communication used to transport data from the Meter
Instrument Rated	Indicator of whether or not the Meter requires a Current Transformer / Potential Transformer
Ratio of Current Transformers	The ratio of the primary to secondary transformer windings of a current transformer that is on the source side of an instrument rated meter
Ratio of Potential Transformers	The ratio of the primary to secondary transformer windings of a potential or voltage transformer that is on the source side of an instrument rated meter
ESI Firmware Version	The firmware version of the ZigBee communication module
HAN Protocol (ZigBee or HomePlug)	Type of HAN Protocol enabled (displayed if available)
Smart Energy Profile	The HAN compliance specification that this meter supports
Interval Setting	How often the Meter is recording usage (length in minutes of the interval)
In flow / Out flow (DG) Capable	Indicator of whether or not the Meter is able to handle both consumption and generation metering
Distributed Generation Channel	The channel number on the meter of the Distributed Generation channel (displayed if available)

Field Name	Brief Description
Remote disconnect / connect Capable	Indicator of whether or not the Meter is enabled for remote disconnects
Meter Status	If the value is E or e, it means that the Meter is energized; If the value is D or d, it means that the Meter is de-energized (displayed if available)
Meter Phases	The number of phases that the meter handles, either 1, 2 or 3 (displayed if available)
Meter Model	Meter Model Identifier (displayed if available)
Last Updated	Last date and timestamp that the Meter information was updated

Figure 33: Meter Information

## 7.2 Displaying Your Meter List – My Meter and Premise Information

If you have more than one (1) Smart Meter associated with your Account, SMT will display the premise information for the Default Meter on the My Premise Information screen.

To view the premise information for a different Smart Meter, click the hotlink on the breadcrumb to display your Meter List and then select a different Smart Meter.

Selecting a Smart Meter from the Meter List that is not the designated Default Meter of your Account will not permanently change the designated Default Meter of your Account. The next time you login to the SMT Portal and view premise information, the premise information for the Default Meter will be displayed. To learn how SMT selects a Default Meter for your Account, refer to *Section 6.2 Adding and Removing Smart Meters*.

Figure 34 shows an example of a Meter List when displayed in SMT.

	Description▼	Service Address▼	City▼	State▼	ESI ID▼	Meter Number▼
<input type="checkbox"/>	Cool Meter	1234 TEST DR	HOUSTON	TX	99999990000000459	12345876
<input type="checkbox"/>	Cool Meter 2	4321 TEST DR	DALLAS	TX	99999990000009054	67854321

Figure 34: Meter List – My Meter and Premise Information

If you have 25 or fewer Smart Meters associated with your Account, your Meter List will automatically display. If you have more than 25 Smart Meters, you will need to search for meters to display in your list.

SMT Procedure – Displaying Your Meter List (25 or fewer Smart Meters) – My Meter and Premise Information	
Step	Action
1	Navigate to the ‘Meters’ tab



SMT Procedure – Displaying Your Meter List (25 or fewer Smart Meters) – My Meter and Premise Information	
Step	Action
2	Select 'My Premise Information' or 'My Meter Details' from the left menu
3	Click 'My Meters' hot link on the breadcrumb
4	<p>Select <i>checkbox</i> (required)</p> <p>Select the checkbox next to a Smart Meter. You may view information for only one (1) Smart Meter at a time.</p>
5	<p>Click the 'View Premise Information' or the 'View Meter Information' button</p> <p>When selecting the 'View Premise Information' button, the information related to your premise (or service address) will be displayed. If you have additional questions about Premise Information contact your Retail Electric Provider.</p> <p>When selecting the 'View Meter Information' button, the information related to your meter will be displayed. If you have additional questions about the Meter Information contact your Retail Electric Provider.</p>

Figure 35: SMT Procedure – Displaying Your Meter List (25 or fewer Smart Meters) – My Meter and Premise Information

### 7.2.1

### Searching for Meters – My Meter and Premise Information

If you have more than 25 Smart Meters associated with your Account, you will see a Search screen. You must search for a specific Smart Meter or a group of Smart Meters to populate the Meter List. A search can be performed on up to 100 meters or ESI IDs. To learn how to conduct a search on more than 100 ESI IDs, refer to Section 7.2.2 *Search for Meters by Importing a File*.

You may also click the link 'Show All' to display all the Smart Meters associated with your Account.



**NOTE:** If you have more than 500 Smart Meters associated with your Account, the 'Show All' link will not appear. In this case, you must search for a specific meter or group of meters. If visible, you may click the link 'Show All' to populate your Meter List.

SMT Procedure – Displaying Your Meter List (Show All) – My Meter and Premise Information	
Step	Action
1	Navigate to the 'Meters' tab
2	Select 'My Premise Information' or 'My Meter Details' from the left menu
3	Click 'My Meters Search' link on the breadcrumb
4	Click 'Show All' link

SMT Procedure – Displaying Your Meter List ( <i>Show All</i> ) – My Meter and Premise Information	
Step	Action
5	<p><i>Select checkbox</i> (required)</p> <p>Select the checkbox next to a Smart Meter. You may view information for only one (1) Smart Meter at a time.</p>
6	<p>Click the ‘View Premise Information’ or the ‘View Meter Information’ button</p> <p>When selecting the ‘View Premise Information’ button, the information related to your premise (or service address) will be displayed. If you have additional questions about Premise Information contact your Retail Electric Provider.</p> <p>When selecting the ‘View Meter Information’ button, the information related to your meter will be displayed. If you have additional questions about the Meter Information contact your Retail Electric Provider.</p>

Figure 36: SMT Procedure – Displaying Your Meter List (*Show All*) – My Meter and Premise Information

SMT Procedure – Displaying Your Meter List ( <i>Search for Meters</i> ) – My Meter and Premise Information	
Step	Action
1	Navigate to the ‘Meters’ tab
2	Select ‘My Premise Information’ or ‘My Meter Details’ from the left menu
3	Click ‘My Meters Search’ link on the breadcrumb
4	<p><i>Select type of meter identifier</i> (required)</p> <p>Select to search by either ESI ID or Meter Number.</p>
5	<p><i>Type one or more meter numbers</i> (required)</p> <p>Enter up to 100 ESI IDs or Meter Numbers (but not both) to correspond with your search type. Values should be separated by a comma (,).</p> <p>You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: 123*, 1*23, or *123).</p> <p>123* shows all ESI IDs/Meter Numbers that begin with ‘123’</p> <p>1*23 shows all ESI IDs/Meter Numbers that begin with ‘1’ and end with ‘23’</p> <p>*123 shows all ESI IDs/Meter Numbers that end with ‘123’</p> <p>You can only use one wildcard/asterisk in a given search. If you use a wildcard, you may not enter other ESI IDs or meter numbers.</p>
6	Click ‘Search’ button

SMT Procedure – Displaying Your Meter List ( <i>Search for Meters</i> ) – My Meter and Premise Information	
Step	Action
7	<p><i>Select checkbox</i> (required)</p> <p>Select the checkbox next to a Smart Meter. You may view information for only one (1) Smart Meter at a time.</p>
8	<p>Click the ‘View Premise Information’ or the ‘View Meter Information’ button</p> <p>When selecting the ‘View Premise Information’ button, the information related to the premise (or service address) of the selected Smart Meter will be displayed. If you have additional questions about Premise Information contact your Retail Electric Provider.</p> <p>When selecting the ‘View Meter Information’ button, the information related to the selected meter will be displayed. If you have additional questions about the Meter Information contact your Retail Electric Provider.</p>

Figure 37: SMT Procedure – Displaying Your Meter List (*Search for Meters*) – My Meter and Premise Information

### 7.2.2 Search for Meters by Importing a File

If you routinely search for the same set of Smart Meters, you may find it beneficial to create a file containing your list of meter information. You can then import that file and search for your specific meters in a single step. The import file must be in a CSV (comma separated values) format and have a file type of CSV. There must be one (1) row of data for each Smart Meter. Each row will have only one value that identifies your Smart Meter – either the ESI ID or the Meter Number. ESI IDs and Meter Numbers cannot be mixed in the same file. Following is an example of the format for an ESI ID file:

```
99999990000000116
99999990001234567
99999990000000789
```

Here is an example of the format for a Meter Number file:

```
900000116
900000123
200001987
```

For help creating a CSV file, see *Appendix A: Working with CSV Files*.



**NOTE:** SMT will reject files that contain trailing commas at the end of each row.

SMT Procedure – Search by Importing a File – My Meter and Premise Information	
Step	Action
1	Navigate to the ‘Meters’ tab

SMT Procedure – Search by Importing a File – My Meter and Premise Information	
Step	Action
2	Select 'My Premise Information' or 'My Meter Details' from the left menu
3	Click 'My Meters Search' link on the breadcrumb
4	<p><i>Select type of meter identifier</i> (required)</p> <p>Select to search by either ESI ID or Meter Number. All entries in the corresponding import file will be interpreted as this type of value.</p>
5	<p><i>Import Meter(s) from a file</i> (required)</p> <p>The file type must be CSV. Click 'Browse' to select the file from your computer. For help creating a CSV file, see <i>Appendix A: Working with CSV Files</i>.</p>
6	<p>Click 'Import' button</p> <p>Import the file and search for the designated meters in your Meter List. The results of your search will be consolidated in a file and the following message will appear in your Search Results:</p> <p><input type="checkbox"/> The information in your import file was used to search your Meter List. Select this Checkbox and Click on Export Information to use the search results to request Meter and/or Premise Information Reports.</p> <p>Selecting the checkbox will cause the Export Report function to create reports and export data for all of the Smart Meters that were successfully found. For information on exporting reports, see <i>Section 7.4 Exporting Reports</i>.</p>
7	<p><i>Select checkbox</i> (required)</p> <p>Select the checkbox next to a Smart Meter. You may view information for only one (1) Smart Meter at a time.</p>
8	<p>Click the 'View Premise Information' or the 'View Meter Information' button</p> <p>When selecting the 'View Premise Information' button, the information related to your premise (or service address) will be displayed. If you have additional questions about Premise Information contact your Retail Electric Provider.</p> <p>When selecting the 'View Meter Information' button, the information related to your meter will be displayed. If you have additional questions about the Meter Information contact your Retail Electric Provider.</p>

Figure 38: SMT Procedure – Search by Importing a File – My Meter and Premise Information

### 7.3 Print or Export from View



If you are currently viewing Meter or Premise Information online, you may print the information or export the information to a file.

SMT Procedure – Printing or Exporting from View – Meter and Premise Information	
Step	Action
1	<p>Click 'Print' button or 'Export' button</p> <p><b>Print</b> will cause your displayed report to print.</p> <p><b>Export</b> will cause your displayed report to be exported to a CSV file. For information on using SMT CSV files, see <i>Appendix A.2 Opening a CSV File</i>.</p>

Figure 39: SMT Procedure – Printing or Exporting from View – Meter and Premise Information

## 7.4 Exporting Reports

If you have more than one Smart Meter associated with your Account, you may choose to Export the Meter and Premise Information without first viewing online. If you choose to Export, you may select multiple Smart Meters to be processed for your request at the same time.

SMT Procedure – Requesting Reports for Export – Premise and Meter Information	
Step	Action
	 <p><b>NOTE:</b> You must have a Meter List displayed before you can complete the remaining steps. For information on displaying your Meter List, see <i>Section 7.2 Displaying Your Meter List – My Meter and Premise Information</i></p>
1	<p><i>Select checkbox (required)</i></p> <p>Select the checkbox next to one or more Smart Meters, or select the checkbox next to the 'Search by Import' message.</p>
2	<p>Click 'Export Information' button</p> <p>A new screen is displayed allowing you to select Types of Information for this export.</p>
3	<p><i>Premise Information</i></p> <p>Select the checkbox to request the Premise Information for each of the previously selected Smart Meters.</p> <p><i>Meter Information</i></p> <p>Select the checkbox to request the Meter Information for each of the previously selected Smart Meters.</p>  <p><b>NOTE:</b> Either report or both may be requested at the same time.</p>

SMT Procedure – Requesting Reports for Export – Premise and Meter Information	
Step	Action
4	<p>Click 'Export' button</p> <p>A new screen will display showing an Order Number for your report request. Your request will be run offline. Your report will be attached to that email as a CSV file. When the request completes, an email will be sent to the Email Address in your Account Profile. For information on retrieving your report, see <i>Section 7.4.1 Retrieving Exported Reports</i></p>

Figure 40: SMT Procedure – Requesting Reports for Export – Premise and Meter Information

### 7.4.1

### Retrieving Exported Reports

If you have submitted a Request for Meter and Premise Information that will run offline, an email will be sent to the Email Address in your Account Profile when the report has completed. Your report will be attached to that email as a CSV file.

You can view the status of your Report Requests at any time. Go to the 'Usage' Tab and Select 'Report Request Status' from the left menu. Figure 41 shows an example of a Report Request Status screen. Following are the potential Report Request status values:

- Processing – Your request is still in process.
- Unsuccessful – Your request could not be processed. This is likely due to a temporary system or internet problem. Submit your request again. If you continue to receive this status, then refer to *Section 14 Additional Help* for information on how to contact the SMT Team.
- Complete – Your report has been generated.

When the status changes to 'completed' the report is generated at SMT and SMT typically sends it to your email within a few minutes. If you do not receive the report within 24 hours, please check your e-mail spam filters and then call the Smart Meter Texas Help Desk.



**NOTE:** The Details section of the Report Request Status screen will display a message if no data was found that matched the Report Options in your Report Request. This may happen, for example, if your selected date range is for a period prior to the installation of your Smart Meter.

#### Report Request Status

When the status changes to 'Completed' the report is generated at SMT and SMT typically sends it to your email within a few minutes. If you do not receive the report within 24 hours, please check your e-mail spam filters and then call the Smart Meter Texas Help Desk at 1-888-616-5859.

Date Requested	Order ID	Status	Details
02/24/2016	f4e22f8a9e71be8a926e856b	In-Progress	You will receive an email notification when the report is complete.
02/24/2016	612e5ca656b5c37171f567bf	Completed	Your report has been generated
02/24/2016	acafdc113544d10eaf9a51c	Completed	Your report has been generated

Figure 41: Report Request Status Screen

## 8 Creating Usage Reports

There are three (3) types of Usage Reports available on SMT:

- Daily Usage (15 min Interval) Report
- Daily Meter Reads Report
- Monthly Usage Report

You may view these reports online or request exports of these reports in CSV or Green Button (XML) format.

### 8.1 Viewing Usage Reports

If you only have one (1) Smart Meter associated with your Account the Daily Usage (15 min intervals) report for that Smart Meter will automatically display when you successfully login to the SMT website.

If you have more than one Smart Meter associated with your Account (Residential or Business), the usage report for your Default Meter will be displayed automatically. You may select the usage report for a different Smart Meter from your Meter List.


Refer to Section 6.2 *Adding and Removing Smart Meters* for the definition of a Default Meter.

If you have a Friend Account and you have access to one (1) Smart Meter, the Daily Usage (15 min intervals) report for that Smart Meter will automatically display when you select My Friends' Usage from the left menu. If you have a Friend Account and you have access to more than one (1) Smart Meter, you must display your Friends' Meter List before you can select reports.

SMT Procedure – Viewing Reports (1 meter)	
Step	Action
1	Navigate to the 'Usage' tab
2	Select 'My Usage' from the left menu to see the usage of your Smart Meter Select 'My Friends' Usage' from the left menu to see the usage of your Friends' Smart Meter

Figure 42: SMT Procedure – Viewing Usage Reports (1 meter)

Report Options can be selected from the top portion of any Report screen. You can dynamically change these options to view different reports for the Smart Meter that was selected. If you want to see a report for a different Smart Meter, you must go back to your Meter List and select a different meter.

SMT Procedure – Changing Usage Report Options	
Step	Action
	<b>NOTE:</b> You must have a report displayed before you can complete these steps.



SMT Procedure – Changing Usage Report Options	
Step	Action
1	<p><i>Report Type</i> (required)</p> <p>Select the desired report from the dropdown box. You may select 'Daily Usage (15 min intervals)', 'Daily Meter Reads', or 'Monthly Usage'</p>
2	<p><i>Start Date</i> (required)</p> <p>Enter a date, or use the Calendar Tool to select a date, that represents the beginning range of the usage data that you would like to see. Your Start Date cannot be more than 13 months prior to today for the Daily Usage and Daily Meter Reads reports, or more than 24 months prior to today for the Monthly Usage.</p> <p> <b>NOTE:</b> Usage data will not be available in SMT prior to February 1, 2010, or prior to your Smart Meter installation date, if it occurred after February 1, 2010.</p>
3	<p><i>End Date</i> (required)</p> <p>Enter a date, or use the Calendar Tool to select a date, that represents the ending range of the usage data that you would like to see.</p> <p> <b>NOTE:</b> Usage data is retrieved from your Smart Meter by your electric utility. SMT receives usage data 7-days/week from the electric utility companies. The data is made available through the SMT website within 2 calendar days. For example, usage data through midnight on Monday is available on Wednesday.</p>
4	<p>Click 'Update Report' button</p> <p>The report options are changed.</p> <p>If your selected options require a small amount of data (for example, less than 40 days for the Daily Usage report) then your report view will update immediately to reflect the new options.</p> <p>If your selected options require a large amount of data (for example, 6 months for the Daily Usage report) then your request will be run offline. In this situation, you will receive an Order Number for your report request. When the request completes, an email will be sent to the Email Address in your Account Profile. For information on retrieving your report, see <i>Section 8.5.3 Retrieving Exported Reports</i>.</p>

Figure 43: SMT Procedure – Changing Usage Report Options



### 8.1.1 Daily Usage (15 min intervals) Report

The Daily Usage (15 min intervals) Report shows electricity usage for the selected Smart Meter in 15-minute segments. The report view displays 96 intervals (one for each 15-minute segment of a 24-hour day) of usage data for one day at a time. Use the Previous Day and Next Day buttons to navigate to other days within your selected date range.

Usage / [My Meters](#) / My Meter - Usage Report

#### My Meter - Usage Report

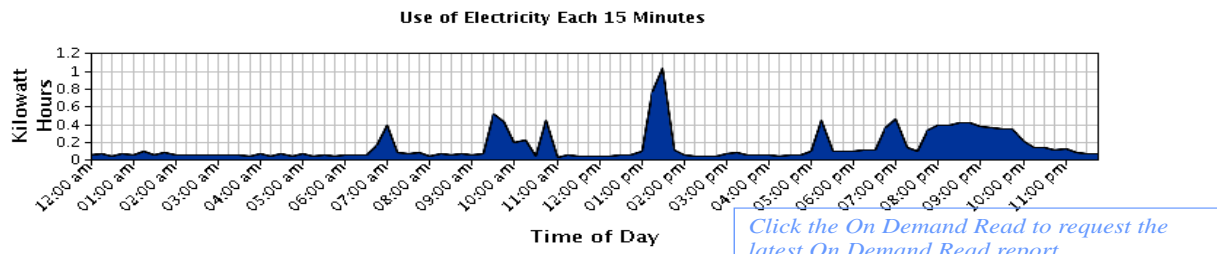
Click "My Meters" navigation link above to choose a different meter to view or export the usage.

Description: My House      ESI ID: 888888000000064  
 Address: 123 Demo Drive,      Meter Number: 88888064  
           Anytown, TX              Meter Multiplier: 1

#### Report Option

Report Type: ▼ Daily Usage (15 min intervals) *Use this dropdown to select another Report Type.*  
 Start Date:         End Date:     
 *Use this Calendar tool to select different Start – End Dates for the Report.*

#### Daily Usage (each 15 minutes) - Kilowatt Hours for 1/21/2013



#### On Demand Read Report

Description	Date	Time	Meter Read	On Demand Usage(kWh)
On Demand Read	01/22/2013	10:53:12	5074	16.141
Latest End of Day Read	01/21/2013	00:00:00	5057.859	

*These are the meter reads of the specified date/timestamp.*

*The On Demand usage is the difference between the On Demand Read reported and the Latest End of Day Read multiplied by the meter's multiplier. E.g. (5074 - 5057.859 kWh) x 1 = 16.141.*

Start Time	End Time	Usage(kWh)	Act./Est.
12:00 am	12:15 am	0.061	A
12:15 am	12:30 am	0.082	A
12:30 am	12:45 am	0.051	A
12:45 am	01:00 am	0.075	A
01:00 am	01:15 am	0.058	A
01:15 am	01:30 am	0.098	A
01:30 am	01:45 am	0.068	A
10:45 pm	11:00 pm	0.118	A
11:00 pm	11:15 pm	0.13	A
11:15 pm	11:30 pm	0.094	A
11:30 pm	11:45 pm	0.082	A
11:45 pm	12:00 am	0.072	A

*The column indicates if the Usage (kWh) is Actual (A) or Estimate (E).*

*This is the kWh usage corresponding to each 15 Minute interval.*

*Click on Export to download the report that is being displayed.*

*Click on Print to print the report that is being displayed.*

*Use these buttons to see the Usage for the next block of days.*

Figure 44: Daily Usage (15 min intervals) Report

### 8.1.2 Daily Meter Reads Report

The Daily Meter Reads Report shows electricity usage for the selected Smart Meter in 1-day segments. The report view displays up to 30 days of usage data at a time. Use the Previous and Next buttons to navigate to other days within your selected date range.

Usage / [My Meters](#) / My Meter - Usage Report

**My Meter - Usage Report**

---

Click "My Meters" navigation link above to choose a different meter to view or export the usage.

Description: My House      ESI ID: 8888880000000064  
 Address: 123 Demo Drive,      Meter Number: 888888064  
 Anytown, TX      Meter Multiplier: 1

---

**Report Option** *Use this dropdown to select another Report Type.*

Report Type: Daily Meter Reads *Use this Calendar tool to select different Start – End Dates for the Report.*

Start Date: 04/30/2014      End Date: 04/30/2014      Update Report *Click on Update Report after you change the Report Type or the Start-End Dates.*

---

**Daily Usage (each 15 minutes) - Kilowatt Hours for 04/30/2014**

Use of Electricity Each 15 Minutes

Day

Print Export Report in Excel Previous Next On Demand Read *Click the On Demand Read to request the latest On Demand Read report.*

---

**On Demand Read Report**

Description	Date	Time	Meter Read	On Demand Usage(kWh)
On Demand Read	01/22/2013	10:53:12	5074	16.141
Latest End of Day Read	01/21/2013	00:00:00	5057.859	

*These are the meter reads of the specified date/timestamp.*

*The On Demand usage is the difference between the On Demand Read reported and the Latest End of Day Read multiplied by the meter's multiplier. E.g. (5074 - 5057.859 kWh) x 1 = 16.141.*

Date	Start Read	End Read	Usage(kWh)
12/22/2012	3700.03	3742.77	42.736
12/23/2012	3742.77	3785.51	42.736
12/24/2012	3785.51	N/A	42.736
12/25/2012	N/A	3828.25	42.736
12/26/2012	3828.25	3870.75	42.736
01/04/2013	N/A	N/A	N/A
01/05/2013	4255.39	4298.13	42.736
01/06/2013	4298.13	4340.87	42.736
01/07/2013	4340.87	4383.61	42.736
01/18/2013	N/A	N/A	N/A
01/19/2013	4911.09	4953.83	42.736
01/20/2013	4953.83	4996.57	42.736
01/21/2013	4996.57	5057.86	61.289

*The usage data displayed on this column corresponds to the sum of the 96 intervals displayed on the Daily Usage (15 Min Interval) Report so it does not necessarily correspond to End Read – Start Read.*

*These are your meter reads for each day.*

Print Export Report in Excel Previous Next

*Click on Export to download the report that is being displayed.*

*Click on Print to print the report that is being displayed.*

*Use these buttons to see the Usage for the next block of days.*

Figure 45: Daily Meter Reads Report



**NOTE:** N/A is displayed if the Start and/or End read values for a day are not available.

### 8.1.3 Monthly Usage Report

The Monthly Usage Report shows the total monthly electricity usage for the selected Smart Meter. You may request up to the previous 24 months of usage data.



**NOTE:** The Monthly Usage Report provides the monthly electricity usage that the electric utility company reports to your Retail Electric Provider. This is the usage amounts reported to your REP and may not match your bill from your REP.

Usage / [My Meters](#) / My Meter - Usage Report

#### My Meter - Usage Report

Click "My Meters" navigation link above to choose a different meter to view or export the usage.

Description: My House      ESI ID: 8888888000000064  
 Address: 123 Demo Drive,      Meter Number: 888888064  
 Anytown, TX      Meter Multiplier: 1

#### Report Option

Report Type:   
 Start Date:

End Date:

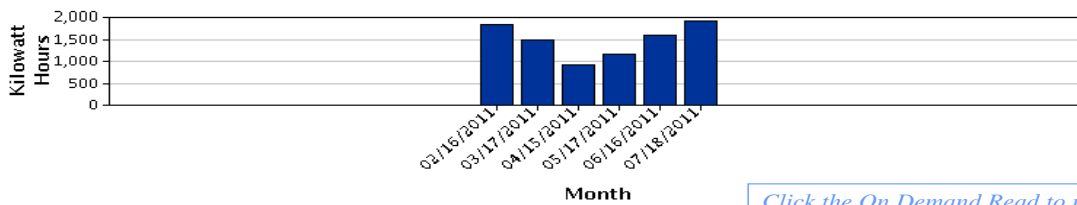
Use this dropdown to select another Report Type.

Use this Calendar tool to select different Start – End Dates for the Report.

Click on Update Report after you change the Report Type or the Start-End Dates.

#### Total Monthly Usage reported to your Retail Electric Provider - Kilowatt Hours

This is the usage amounts reported to your REP and may not match your bill from your REP



Click the On Demand Read to request the latest On Demand Read report.

#### On Demand Read Report

Description	Date	Time	Meter Read	On Demand Usage(kWh)
On Demand Read	01/22/2013	10:53:12	5074	16.141
Latest End of Day Read	01/21/2013	00:00:00	5057.859	

These are the meter reads of the specified date/timestamp.

The On Demand usage is the difference between the On Demand Read reported and the Latest End of Day Read multiplied by the meter's multiplier. E.g. (5074 - 5057.859 kWh) x 1 = 16.141.

Start Date	End Date	Actual kWh	Metered KW	Billed KW	Metered KVA	Billed KVA
01/18/2011	02/16/2011	1841	0	0	0	0
02/16/2011	03/17/2011	1512	0	0	0	0
03/17/2011	04/15/2011	927	0	0	0	0
04/15/2011	05/17/2011	1167	0	0	0	0
05/17/2011	06/16/2011	1614	0	0	0	0
06/16/2011	07/18/2011	1931	0	0	0	0

These are additional units of Measure for your monthly electricity usage. These columns will only display values if they are available.

Click on Export to download the report that is being displayed.

This is the kWh usage corresponding to each month. This column will always display values.

Click on Print to print the report that is being displayed.

Figure 46: Monthly Usage Report



**NOTE:** N/A is displayed if the kWh value for a month is not available.

### 8.1.4 On Demand Read Report

You may request an On Demand Read of your meter during your viewing of any one of the Usage Report online. SMT allows you to request an On Demand Read of your meter once every hour, 24 times in a day.




SMT Procedure – Requesting an On Demand Read	
 <b>NOTE:</b> You must have a report displayed before you can complete these steps.	
Step	Action
1	Click 'On Demand Read' button  Your On Demand Read request will be processed immediately. You may click the link provided 'Click here' to refresh the page after a few moments. The On Demand Read Report section will be refreshed with the latest data.   <b>NOTE:</b> If the On Demand data is NOT successfully retrieved, you will see a message "Error! On Demand Read request could not be fulfilled. Please try again" displayed on the report screen. You may try to request again.   <b>NOTE:</b> If you have submitted a request within an hour and the request has been processed by SMT, this button will be disabled. You may come back to the Usage Report screen to make another request for your meter after an hour.

Figure 47: SMT Procedure – Requesting an On Demand Read

## 8.2 Displaying Your Meter List – My Usage

To view the usage report for a Smart Meter that is not your Default meter, click the hotlink on the breadcrumb as displayed below to open your Meter List and then choose the Smart Meter in which you are interested.

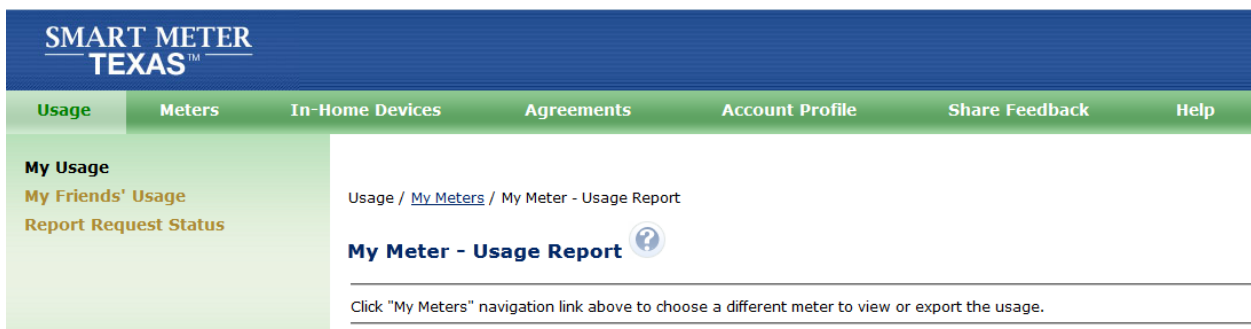


Figure 48: Usage Report Breadcrumb

Your Meter List contains all of the Smart Meters that are associated with your Account. Figure 49 shows an example of a Meter List when displayed in SMT.

	Description▼	Service Address▼	City▼	State▼	ESI ID▼	Meter Number▼
<input type="checkbox"/>	Cool Meter	1234 TEST DR	HOUSTON	TX	99999990000000459	12345876
<input type="checkbox"/>	Cool Meter 2	4321 TEST DR	DALLAS	TX	99999990000009054	67854321

Figure 49: Meter List – My Usage

If you have 25 or fewer Smart Meters associated with your Account your Meter List will automatically display when you click the My Meter link on the breadcrumb of your Usage Report page. If you have more than 25 Smart Meters, you will need to search for meters to display in your list.

SMT Procedure – Displaying Your Meter List (25 or fewer meters) – My Usage	
Step	Action
1	Navigate to the ‘Usage’ tab
2	Select ‘My Usage’ from the left menu
3	Click ‘My Meters’ link on the breadcrumb
4	<p>Select <i>checkbox</i> (required)</p> <p>Select the checkbox next to the Smart Meter. You may view usage reports for only one (1) Smart Meter at a time.</p>
5	<p>Click ‘View Report’ button</p> <p>The Daily Usage (15 min intervals) report is displayed.</p>

Figure 50: SMT Procedure – Displaying Your Meter List (25 or fewer) – My Usage

## 8.2.1 Searching for Meters – My Usage

If you have more than 25 Smart Meters associated with your Account, you will see a Search screen. You must search for a specific Smart Meter or a group of Smart Meters to populate the search results with a Meter List. A search can be performed on up to 100 meters or ESI IDs if you enter the values on the search page. You may also select the link ‘Show All’ to display all the Smart Meters.



**NOTE:** If you have more than 500 Smart Meters associated with your Account, the ‘Show All’ link will not appear. In this case, you must search for a specific meter or group of meters. A search can be performed on up to 100 meters or ESI IDs. If visible, you may click the link ‘Show All’ to populate your Meter List.

SMT Procedure – Displaying Your Meter List ( <i>Show All</i> ) – My Usage	
Step	Action
1	Navigate to the 'Usage' tab
2	Select 'My Usage' from the left menu
3	Click 'My Meters Search' link on the breadcrumb
4	Click 'Show All' link

Figure 51: SMT Procedure – Displaying Your Meter List (*Show All*) – My Usage

SMT Procedure – Displaying Your Meter List ( <i>Search for Meters</i> ) – My Usage	
Step	Action
1	Navigate to the 'Usage' tab
2	Select 'My Usage' from the left menu
3	Click 'My Meters Search' link on the breadcrumb
4	<i>Select type of meter identifier</i> (required) Select to search by either ESI ID or Meter Number.
5	<i>Type one or more meter numbers</i> (required)  Enter up to 100 ESI IDs or Meter Numbers (but not both) to correspond with your search type. Values should be separated by a comma (,).  You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: 123*, 1*23, or *123).  123* shows all ESI IDs/Meter Numbers that begin with '123'  1*23 shows all ESI IDs/Meter Numbers that begin with '1' and end with '23'  *123 shows all ESI IDs/Meter Numbers that end with '123'  You can only use one wildcard/asterisk in a given search. If you use a wildcard, you may not enter other ESI IDs or meter numbers.
6	Click 'Search' button

Figure 52: SMT Procedure – Displaying Your Meter List (*Search for Meters*) – My Usage

## 8.2.2 [Search for Meters by Importing a File – My Usage](#)

If you routinely search for the same set of Smart Meters, you may find it beneficial to create a file containing your list of meter information. You can then import that file and search for your specific meters in a single step. The import file must be in a CSV (comma separated values) format and have a file type of CSV. There must be one (1) row of data for each Smart Meter. Each row will have only one

value that identifies your Smart Meter – either the ESI ID or the Meter Number. ESI IDs and Meter Numbers cannot be mixed in the same file. Following is an example of the format for an ESI ID file:

```
99999990000000116
99999990001234567
999999900000000789
```

Here is an example of the format for a Meter Number file:

```
900000116
900000123
200001987
```

For help creating a CSV file, see *Appendix A: Working with CSV Files*.



**NOTE:** SMT will reject files that contain trailing commas at the end of each row.

SMT Procedure – Search by Importing a File	
Step	Action
1	Navigate to the ‘Usage’ tab
2	Select ‘My Usage’ from the left menu
3	Click ‘My Meters Search’ link on the breadcrumb
4	<p><i>Select type of meter identifier</i> (required)</p> <p>Select to search by either ESI ID or Meter Number. All entries in the corresponding import file will be interpreted as this type of value.</p>
5	<p><i>Import Meter(s) from a file</i> (required)</p> <p>The file type must be CSV. Click ‘Browse’ to select the file from your computer. For help creating a CSV file, see <i>Appendix A: Working with CSV Files</i>.</p>
6	<p>Click ‘Import’ button</p> <p>Import the file and search for the designated meters in your Meter List. The results of your search will be consolidated in a file and the following message will appear in your Search Results:</p> <p><input type="checkbox"/> The information in your import file was used to search your Meter List. Select this Checkbox and Click on Export Report(s) to use the search results to request Usage Reports.</p> <p>Selecting the checkbox will cause the Export Report function to create reports and export data for all of the Smart Meters that were successfully found. For information on exporting reports, see <i>Section 8.5 Exporting Reports</i>.</p>

Figure 53: SMT Procedure – Search by Importing a File



**NOTE:** If you search for Smart Meters by importing a file, you can only export the usage data because you can only view Usage Reports online for one (1) Smart Meter at a time.



**NOTE:** The Search for Meters by Importing a File function is not available under the ‘My Friends’ Smart Meters’ link. This function is only available to search for the Smart Meters associated with your account as a Residential or Business Customer.

### 8.3 Displaying Your Meter List – My Friends’ Usage

Your Friends’ Meter List contains all of the Smart Meters that you have been authorized to view. Figure 54 shows an example of a Meter List when displayed in SMT.

	Description▼	Service Address▼	City▼	State▼	ESI ID▼	Meter Number▼
<input type="checkbox"/>	Cool Meter	1234 TEST DR	HOUSTON	TX	99999990000000459	12345876
<input type="checkbox"/>	Cool Meter 2	4321 TEST DR	DALLAS	TX	99999990000009054	67854321

Figure 54: Meter List – My Friends’ Usage

If you are authorized to view 25 or fewer Friends’ Smart Meters, the Meter List will automatically display. If you are authorized to access more than 25 Friends’ Smart Meters, you will need to search for meters to display in your list.

SMT Procedure – Displaying Your Meter List (25 or fewer meters) – My Friends’ Usage	
Step	Action
1	Navigate to the ‘Usage’ tab
2	Select ‘My Friends’ Usage’ from the left menu

Figure 55: SMT Procedure – Displaying Your Meter List (25 or fewer) – My Friends’ Usage

#### 8.3.1 Searching for Meters – My Friends’ Usage

If you are authorized to view more than 25 Smart Meters associated with your friends’ accounts, you will see a Search screen. You must search for a specific Smart Meter or a group of Smart Meters to populate the search results with a Meter List. A search can be performed on up to 100 meters or ESI IDs if you enter the values on the search page. You may also select the link ‘Show All’ to display all the Smart Meters.



**NOTE:** If you have authorization to view more than 500 Smart Meters associated with your friend’s Accounts, the ‘Show All’ link will not appear. In this case, you must search for a specific meter or group



of meters. A search can be performed on up to 100 meters or ESI IDs. If visible, you may click the link 'Show All' to populate your Meter List.

SMT Procedure – Displaying Your Meter List ( <i>Show All</i> ) – My Friends' Usage	
Step	Action
1	Navigate to the 'Usage' tab
2	Select 'My Friends' Usage' from the left menu
3	Click 'Show All' link

Figure 56: SMT Procedure – Displaying Your Meter List (*Show All*) – My Friends' Usage

SMT Procedure – Displaying Your Meter List ( <i>Search for Meters</i> ) – My Friends' Usage	
Step	Action
1	Navigate to the 'Usage' tab
2	Select 'My Friends' Usage' from the left menu
3	<i>Select type of meter identifier</i> (required) Select to search by either ESI ID or Meter Number.
4	<i>Type one or more meter numbers</i> (required) Enter up to 100 ESI IDs or Meter Numbers (but not both) to correspond with your search type. Values should be separated by a comma (,). You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: 123*, 1*23, or *123). 123* shows all ESI IDs/Meter Numbers that begin with '123' 1*23 shows all ESI IDs/Meter Numbers that begin with '1' and end with '23' *123 shows all ESI IDs/Meter Numbers that end with '123' You can only use one wildcard/asterisk in a given search. If you use a wildcard, you may not enter other ESI IDs or meter numbers.
5	Click 'Search' button

Figure 57: SMT Procedure – Displaying Your Meter List (*Search for Meters*) – My Friends' Usage

## 8.4 Print or Export from View

If you are currently viewing a report online, you may print the report or export the report to a file.


SMT Procedure – Printing or Exporting from View	
Step	Action
 <b>NOTE:</b> You must have a report displayed before you can complete these steps. For more information on viewing reports, see <i>Section 8.1 Viewing Usage Reports</i> . <b>Error! Reference source not found.</b>	
1	Click 'Print' button or 'Export' button  <b>Print</b> will cause your displayed report to print. The full report, as designated by the current Report Options, will print even though your view may only be displaying a specific page.  <b>Export</b> will cause your displayed report to be exported to a CSV file. The full report, as designated by the current Report Options, will export even though your view may only be displaying a specific page. The file will be in a CSV format. For information on using SMT CSV files, see <i>Appendix A.2 Opening a CSV File</i> .

Figure 58: SMT Procedure – Printing or Exporting from View

## 8.5 Exporting Reports

Reports can be exported in Green Button (XML) format or in CSV format. It is recommended that you use the CSV format for personal use using MS Excel, and use the XML format for sharing or handing over to applications that consume the file as part of a program.

The Green Button allows you download your energy usage information from SMT into a nationally standardized format. You can then load the information into programs you have obtained from others or voluntarily share it with 3rd Party entities to help manage your electricity use. Once you login, you can follow the icon to run a Green Button report. The Green Button only allows you to download up to 13 months data of the "Daily Usage (15 min intervals) report" option. The Green Button icon is placed on several pages of the Smart Meter Texas site to help with navigation.



Figure 59: Green Button Icon

If you want to export Daily Meter Reads or Monthly Usage data, you may export your reports in CSV format. With the CSV format option, you may select multiple Smart Meters to be processed for your report at the same time. The CSV report option allows you to download up to 13 months data of all three report options (i.e. "Daily Usage (15 min intervals) report", "Daily Meter Reads" and "Monthly Usage").

## 8.5.1

## Retrieving Exported Reports in XML (Green Button)









SMT Procedure – Requesting Reports for Export in XML	
Step	Action
	 <b>NOTE:</b> You can only request XML report using the Daily Usage (15 min intervals) report option for one meter at a time.
1	<p><i>Select checkbox (required)</i></p> <p>Select the checkbox next to one Smart Meter (If you have only one Smart Meter, clicking the Usage tab takes you directly to the Usage page i.e. there's no need to select checkbox)</p>
2	<p>Click on "View Usage" or "Export Report(s)" button</p> <p>A new screen is displayed allowing you to select Report Options for this export.</p>  <p><b>NOTE:</b> From both the Usage page and the Export Report(s) page, you can export Green Button report by selecting 15 min interval option and clicking the 'Export Report in XML' button or the Green Button logo.</p>
3	<p><i>Select the Daily Usage (15 min interval) report option</i></p> <p>If you clicked the "View Usage" button from the prior step, select the Daily Usage (15 min intervals) report from the drop down menu under the Report Options section on the Usage Report page.</p> <p>If you clicked the "Export Report(s)" button from the prior step, select the Daily Usage (15 minute intervals) checkbox under the Report Options section on the Export Report(s) page.</p>
4	<p><i>Daily Usage (15 min interval) Start Date</i></p> <p>Enter a date, or use the Calendar Tool to select a date, that represents the beginning range of the usage data that you would like to see. Your Start Date cannot be more than 13 months prior to today.</p>
5	<p><i>Daily Usage (15 min interval) End Date</i></p> <p>Enter a date, or use the Calendar Tool to select a date, that represents the ending range of the usage data that you would like to see. Your date range (range between Start date and End date) should be no more than 13 months.</p>
6	<p>Click the Green Button Icon or the 'Export Report(s) in XML' button</p> <p>A new screen will display showing an Order Number for your report request. Your request will be run offline. When the request completes, an email will be sent to the Email Address in your Account Profile. Your report will be attached to the email. For information on retrieving your report, see <i>Section 8.5.3 Retrieving Exported Reports</i>.</p>

Figure 60: SMT Procedure – Requesting Reports for Export in XML

## 8.5.2

## Retrieving Exported Reports in CSV

SMT Procedure – Requesting Reports for Export in CSV	
Step	Action
 <b>NOTE:</b> You must have a Meter List displayed before you can complete the remaining steps. For information on displaying your Meter List, see <i>Section 8.2 Displaying Your Meter List – My Usage</i> .	
1	<p><i>Select checkbox</i> (required)</p> <p>Select the checkbox next to one or more Smart Meters, or select the checkbox next to the 'Search by Import' message.</p>
2	<p>Click 'Export Report(s)' button</p> <p>A new screen is displayed allowing you to select Report Options for this export.</p>  <p><b>NOTE:</b> If you only selected one meter from the previous steps, you may also continue this process by clicking the 'View Usage' Button. The 'View Usage' button grays out when more than one meter is selected because you can only view the energy data of one meter at a time.</p>
3	<p><i>Select Daily Usage (15 min interval) report option</i></p> <p>If you clicked the "View Usage" button from the prior step, select the Daily Usage (15 min intervals) report from the drop down menu under the Report Options section on the Usage Report page.</p> <p>If you clicked the "Export Report(s)" button from the prior step, select the Daily Usage (15 min intervals) checkbox under the Report Options section on the Export Report(s) page.</p>
4	<p><i>Daily Usage (15 min interval) Start Date</i> (required if <i>Daily Usage option</i> is selected)</p> <p>Enter a date, or use the Calendar Tool to select a date, that represents the beginning range of the usage data that you would like to see. Your Start Date cannot be more than 13 months prior to today.</p>  <p><b>NOTE:</b> Usage data will not be available in SMT prior to February 1, 2010, or prior to your Smart Meter installation date, if it occurred after February 1, 2010.</p>

SMT Procedure – Requesting Reports for Export in CSV	
Step	Action
5	<p><i>Daily Usage End Date</i> (required if <i>Daily Usage option</i> is selected)</p> <p>Enter a date, or use the Calendar Tool to select a date, that represents the ending range of the usage data that you would like to see.</p> <p> <b>NOTE:</b> Usage data is retrieved from your Smart Meter by your electric utility. SMT receives usage data 7-days/week from the electric utility companies. The data is made available through the SMT website within 24 hours of the last meter retrieval. For example, usage data through midnight on Monday is available by 12:01 AM on Wednesday.</p>
6	<p><i>Select the Daily Meter Reads report option</i></p> <p>If you clicked the "View Usage" button in step 2 above, select the Daily Meter Reads report from the drop down menu under the Report Options section on the Usage Report page</p> <p>If you clicked the "Export Report(s)" button in step 2 above, select the Daily Meter Reads checkbox under the Report Options section on the Export Report(s) page</p>
7	<p><i>Daily Meter Reads Start Date</i> (required if <i>Daily Meter Reads option</i> is selected)</p> <p>Enter a date, or use the Calendar Tool to select a date, that represents the beginning range of the usage data that you would like to see. Your Start Date cannot be more than 13 months prior to today.</p> <p>Daily Meter Reads Start Date (required if Daily Meter Reads option is selected)</p> <p> <b>NOTE:</b> Usage data will not be available in SMT prior to February 1, 2010, or prior to your Smart Meter installation date, if it occurred after February 1, 2010.</p>
8	<p><i>Daily Meter Reads end Date</i> (required if <i>Daily Meter Reads option</i> is selected)</p> <p>Enter a date, or use the Calendar Tool to select a date, that represents the ending range of the usage data that you would like to see.</p> <p> <b>NOTE:</b> Usage data is retrieved from your Smart Meter by your electric utility. SMT receives usage data 7-days/week from the electric utility companies. The data is made available through the SMT website within 24 hours of the last meter retrieval. For example, usage data through midnight on Monday is available by 12:01 AM on Wednesday.</p>


SMT Procedure – Requesting Reports for Export in CSV	
Step	Action
9	<p><i>Select the Monthly Usage report option</i></p> <p>If you clicked the "View Usage" button in Step 2 above, select the Monthly Usage report from the drop down menu under the Report Options section on the Usage Report page.</p> <p>If you clicked the "Export Report(s)" button in Step 2 above, select the Monthly Usage checkbox under the Report Options section on the Export Report(s) page.</p>
10	<p><i>Monthly Usage Start Date (required if Monthly Usage option is selected)</i></p> <p>Enter a date, or use the Calendar Tool to select a date, that represents the beginning range of the usage data that you would like to see. Your Start Date cannot be more than 24 months prior to today.</p> <p> <b>NOTE:</b> Usage data will not be available in SMT prior to February 1, 2010, or prior to your Smart Meter installation date, if it occurred after February 1, 2010.</p>
11	<p><i>Monthly Usage end Date (required if Monthly Usage option is selected)</i></p> <p>Enter a date, or use the Calendar Tool to select a date, that represents the ending range of the usage data that you would like to see.</p>
12	<p>Click 'Export Report(s) in CSV' button</p> <p>A new screen will display showing an Order Number for your report request. Your request will be run offline. When the request completes, an email will be sent to the Email Address in your Account Profile. Your report will be attached to the email. For information on retrieving your report, see <i>Section 8.5.3 Retrieving Exported Reports</i>.</p>

Figure 61: SMT Procedure – Requesting Reports for Export in CSV

### 8.5.3

### Retrieving Exported Reports

If you have submitted a Report Request that will run offline, an email will be sent to the Email Address in your Account Profile when the report has completed. Your report will be attached to that email accordingly as a CSV or XML file.

You can view the status of your Report Requests at any time. Go to the Usage Tab and Select Report Request Status from the left menu. Figure 62 shows an example of a Report Request Status screen. Following are the potential Report Request status values:

- Processing – Your request is still in process.
- Unsuccessful – Your request could not be processed. This is likely due to a temporary system or internet problem. Submit your request again. If you continue to receive this status, then refer to *Section 13 Additional Help*
- Complete – Your report has been generated

When the status changes to 'completed' the report is generated at SMT and SMT typically sends it to your email within a few minutes. If you do not receive the report within 24 hours, please check your e-mail spam filters and then call the Smart Meter Texas Help Desk.



**NOTE:** The Details section of the Report Request Status screen will display a message if no data was found that matched the Report Options in your Report Request. This may happen, for example, if your selected date range is for a period prior to the installation of your Smart Meter.

### Report Request Status

When the status changes to 'Completed' the report is generated at SMT and SMT typically sends it to your email within a few minutes. If you do not receive the report within 24 hours, please check your e-mail spam filters and then call the Smart Meter Texas Help Desk at 1-888-616-5859.

Date Requested	Order ID	Status	Details
02/24/2016	f4e22f8a9e71be8a926e856b	In-Progress	You will receive an email notification when the report is complete.
02/24/2016	612e5ca656b5c37171f567bf	Completed	Your report has been generated
02/24/2016	acafcdc113544d10eaf9a51c	Completed	Your report has been generated

Figure 62: Report Request Status Screen

## 9 Managing Third-Party Agreements

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A Third-Party Service Provider is a company that provides services to consumers related to energy use, such as energy management services and/or devices to monitor energy use and control consumption.

Third-Party Service Providers can either be:

- Retail Electric Providers (REPs) who are authorized to sell electricity to consumers in the state of Texas but are not your current Retail Electric Provider,
- Independent Third-Party Service Providers that provide energy related services but who are not authorized to sell electricity to consumers in the state of Texas.

You may allow one or more Third-Party Service Providers to view your usage data, add an In-Home Device to your Smart Meters, or provide In-Home Device related services.

Your current REP is automatically authorized to access your usage data. But for them to add or remove In-Home Devices to your Smart Meters or provide In-Home Device related services to you, they will need to establish a Third-Party Agreement with you.

### 9.1 Types of Third-Party Agreements

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SMT supports three (3) types of Third-Party Agreements:

- Energy Data Agreement
- In-Home Device Agreement
- In-Home Device Services Agreement

#### 9.1.1 Energy Data Agreement

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An Energy Data Agreement allows a Third-Party Service Provider to view your energy usage, meter and premise information and perform On-Demand Read requests.



**NOTE:** Your current REP of Record (ROR) does not require an Energy Data Agreement to perform these functions.

There are two (2) types of Energy Data Agreements.

- Fixed ESI IDs - Energy Data Agreement with a list of specific ESI IDs only
  - This type of Energy Data Agreement is available if you have registered with SMT.
  - The Third-Party Service Provider has to provide a list of ESI IDs when they initiate a new Energy Data Agreement. They may provide up to one hundred (100) ESI IDs.



- Once the Agreement is established, the Third-Party Service Provider will not be allowed to add or remove ESI IDs associated with the Agreement.
- Once the Agreement is established, you are not allowed to add ESI IDs to the Agreement. However, if you remove an ESI ID from your SMT account after the Agreement is accepted, the ESI ID will be removed from your Energy Data Agreement.
- If all the ESI IDs are removed from your SMT account, your Energy Data Agreement will be terminated automatically.
- If there is at least one (1) ESI ID in the Energy Data Agreement, you or your Third-Party Service Provider may terminate the Agreement at any time before the Agreement expires.
- This type of Energy Data Agreement works best when you want to limit the Third-Party Service Provider to a specific list of ESI IDs (up to 100) and do not allow the Third-Party to add new ESI IDs to the Agreement later.
- Flexible ESI IDs - Energy Data Agreement with all ESI IDs under your SMT account
  - This type of Energy Data Agreement is available whether you have registered with SMT or not.
  - Your Third-Party Service Provider will need to provide one (1) ESI ID during the initiation of the Agreement. All the ESI IDs in your SMT account will automatically be added to this Energy Data Agreement.
  - Third-Party Service Provider is not allowed to add or remove ESI IDs associated with the Agreement. However, when you add or remove an ESI ID to your SMT account, the ESI ID will be added or removed from the Agreement automatically.
  - You or your Third-Party Service Provider may terminate the Agreement at any time before the Agreement expires.
  - If there is no ESI ID in your SMT account, this Energy Data Agreement will remain in Active status until one of the following occurs:
    - Your Third-Party Service Provider terminates the Agreement
    - You terminate the Agreement
    - The Agreement expires based on the Agreement duration.
  - If there is no ESI ID in your SMT account, you will not be allowed to extend the Agreement.
  - This type of Energy Data Agreement works best if you have more than one hundred (100) ESI IDs in your SMT account or you want to allow the Third-Party Service Provider to access all of your ESI IDs.

An Energy Data Agreement can be established for up to twelve (12) months in duration. If the initial Energy Data Agreement is less than twelve (12) months and you want to extend it to the maximum duration, refer to Section 9.3.6 to learn how to extend the duration of an Energy Data Agreement.

Once an Energy Data Agreement is established, your Third-Party Service Provider will have access to the following data:

- Meter and Premise Information
- Daily Usage (15 minute intervals), Daily Meter Reads and Monthly usage reports online, request On-Demand Reads, and export usage to CSV file and Green Button (XML) format.

### 9.1.2

#### In-Home Device Agreement

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An In-Home Device Agreement allows a Third-Party Service Provider to add (provision) an In-Home Device to your Smart Meter.

SMT allows the provisioning of up to five (5) In-Home Devices per ESI ID. Each In-Home Device requires a separate In-Home Device Agreement.

An In-Home Device Agreement does not expire until one of the following occurs:

- You move out of the service location where the In-Home Device is associated
- You remove the In-Home Device and choose to terminate the Agreement
- Your Third-Party Service Provider removes the In-Home Device and chooses to terminate the Agreement
- The Agreement is closed by SMT when there is no In-Home Device associated with the Agreement for thirty (30) calendar days.

Before you establish the In-Home Device Agreement, make sure you have reviewed the manufacturer's instructions on how to install and operate the new In-Home Device.

### 9.1.3

#### In-Home Device Services Agreement

---

An In-Home Device Services Agreement allows a Third-Party Service Provider to send text messages, pricing signals and load control events to your In-Home Devices.

An In-Home Device Services Agreement does not expire until one of the following occurs:

- You move out of the service location where the In-Home Device is associated
- You remove the In-Home Device and choose to terminate the Agreement
- Your Third-Party Service Provider removes the In-Home Device and chooses to terminate the Agreement
- The Agreement is closed by SMT when there is no In-Home Device associated with the Agreement for thirty (30) calendar days.

Your Third-Party Service Provider may select at least one (1) of the following types of messages or any combination of the three for each ESI ID in the Agreement Invitation:

- Simple Text
- Load Control
- Price

Your Third-Party Service Provider cannot change the type(s) of messages or the Devices in the Agreement once the Invitation is submitted. If you want to change the message type(s) or the Device in the Agreement, you need to terminate the Agreement and request a new one.

## 9.2 Displaying Your Third-Party Agreements

Your Third-Party Agreement List contains all the active and pending Agreements that are associated with your Account. Third-Party Agreements that are no longer active will only be viewable on this list for thirty (30) calendar days. Figure 63 shows an example of a Third-Party Agreement List when displayed in SMT.

	Agreement Type ▼	Agreement #▼	Start Date ▼	End Date ▼	Company Name	Status ▼
<input type="radio"/>	In-Home Device	1381	08/13/2014		CJ_rep3	Close Pending
<input type="radio"/>	In-Home Device	1833	08/28/2014	N/A	CJ_rep3	Active
<input type="radio"/>	Energy Data - Fixed	874	08/04/2014	11/04/2014	CJ_thirdparty9	Extension Pending
<input type="radio"/>	In-Home Device	1463	08/19/2014		CJ_thirdparty9	Close Pending

Figure 63: Third-Party Agreement List

If you have 25 or fewer Third-Party Agreements associated with your Account, your Agreement List will automatically display. If you have more than 25 Third-Party Agreements, you will need to search for Agreements to display in your list.

SMT Procedure – Displaying Third-Party Agreement List (25 or fewer Smart Meters)	
Step	Action
1	Navigate to the 'Agreements' tab
2	Select 'My 3 <sup>rd</sup> Party Agreements' from the left menu

Figure 64: SMT Procedure – Displaying Third-Party Agreements List (25 or fewer)

### 9.2.1 Searching for Third-Party Agreements

If you have more than 25 Third-Party Agreements associated with your Account, you will see a Search screen. You must search for a specific Third-Party Agreement or a group of Third-Party Agreements to populate the search results with a Third-Party Agreements List.

A search can be performed on up to 100 items. You can choose one of the following search criteria:

- Third-Party Agreement Number
- Third-Party Company Name

- ESI ID(s)
- Meter Number(s)
- In-Home Device MAC Address

You can choose to search for Third-Party Agreements by selecting an Agreement Status.

If you have less than 500 Third-Party Agreements, click the link 'Show All' to display the Third-Party Agreements associated with your Account.



**NOTE:** If you have more than 500 Third-Party Agreements associated with your Account, the 'Show All' link will not appear. In this case, you must search for a specific Agreement or group of Agreements.

SMT Procedure – Displaying Third-Party Agreements List ( <i>Show All</i> )	
Step	Action
1	Navigate to the 'Agreements' tab
2	Select 'My 3 <sup>rd</sup> Party Agreements' from the left menu
3	Click 'Show All' link

Figure 65: SMT Procedure – Displaying Third-Party Agreements List (*Show All*)

SMT Procedure – Displaying Third-Party Agreements List ( <i>Search for Agreements</i> )	
Step	Action
1	Navigate to the 'Agreements' tab
2	Select 'My 3 <sup>rd</sup> Party Agreements' from the left menu
3	<p><i>Choose Search Criteria or Search by Agreement Status</i> (required)</p> <p>Select the 'Select Search Criteria' option if you want to search by Third-Party Agreement Number, Third-Party Company Name, ESI ID, Meter Number or In-Home Device MAC Address. <b>Go to Step 4.</b></p> <p>Select the 'Status' option if you want to search by Third-Party Agreement Status. <b>Go to Step 5.</b></p>

SMT Procedure – Displaying Third-Party Agreements List ( <i>Search for Agreements</i> )	
Step	Action
4	<p><b>From Step 3</b></p> <p><i>Type one or more search items (required)</i></p> <p>Enter up to 100 Third-Party Agreement Number, Third-Party Company Name, ESI IDs, Meter Numbers, or In-Home Device MAC Address to correspond with your search type. All the search values must be the same search type, and should be separated by a comma (,).</p> <p>You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: abc*, a*bc, or *abc).</p> <p>abc* shows all entries that begin with 'abc'</p> <p>a*bc shows all entries that begin with 'a' and end with 'bc'</p> <p>*abc shows all entries that end with 'abc'</p> <p>You can only use one wildcard/asterisk in a given search. If you use a wildcard, you may not enter other search values.</p> <p><b>Go to Step 6.</b></p>
5	<p><b>From Step 3</b></p> <p>Select an Agreement Status from the dropdown. <b>Go to Step 6.</b></p>
6	<p><b>From Step 4 / Step 5</b></p> <p>Click 'Search' button</p>

Figure 66: SMT Procedure – Displaying Third-Party Agreements List (*Search for Agreements*)

### 9.3 Viewing Your Third-Party Agreements

To view your Third-Party Agreement, you must first have the Third-Party Agreement List displayed. See *Section 9.2 Displaying Your Third-Party Agreements*.

You can view your Third-Party Agreements at any time if they are in the following statuses:

- Pending,
- Extension Pending,
- Active,
- Close Pending

If your Agreement is Rejected or Not Accepted, or your Agreement is Closed or Completed, you will no longer be able to view the Agreement after thirty (30) calendar days. For the descriptions of the Third-Party Agreement Status, refer to *Section 9.3.1 Third-Party Agreement Status*.






SMT Procedure – View/Edit Customer Agreement	
Step	Action
 <b>NOTE:</b> You must first select the desired Agreement from your Third-Party Agreement List and display the Agreement on your View & Edit Third-Party Agreement screen before you can complete the following steps. Refer to <i>Section 9.2 Displaying Your Third-Party Agreements</i> to learn how to search for your Agreement.	
1	<i>Select checkbox (required)</i> Select the checkbox next to one of the Third-Party Agreements.
2	Click 'View/Edit Agreement' button  <b>NOTE:</b> View/Edit Agreement is only available for one Agreement at a time.

Figure 67: SMT Procedure – View/Edit Customer Agreement

### 9.3.1 [Third-Party Agreement Status](#)

You can find the status of the Third-Party Agreement that you are viewing on the View and Edit Third-Party Agreement screen. Figure 68 defines the various statuses of a Third-Party Agreement.

Customer Agreement Status Values	
Status	Status Description
Active	You have accepted the Agreement. If you have an active Energy Data Agreement, your Third-Party Service Provider is now able to view and export your usage data, premise data, and meter data. If you have an active In-Home Device Agreement: <ul style="list-style-type: none"> <li>▪ The In-Home Device is now in progress of being added to your Smart Meter or it has been added successfully. For status descriptions of the In-Home Device, see Section 12.2 Adding In-Home Devices .</li> <li>▪ You can remove the In-Home Device from your Smart Meter and keep your Agreement in Active status for up to thirty (30) calendar days. See Section 12.3 Removing In-Home Devices for more information of Removing In-Home Devices.</li> </ul> If you have an active In-Home Device Services Agreement, your Third-Party is now able to send the selected type(s) of messages to your In-Home Device.

Customer Agreement Status Values	
Status	Status Description
Pending	<p>The Agreement Invitation is awaiting your action. You should have received an Agreement Invitation from SMT. You can either accept or reject the Agreement Invitation directly from the email, or login to your SMT account to accept or reject the Agreement from the View &amp; Edit Third-Party Agreement screen.</p> <p>An Agreement Invitation expires after thirty (30) calendar days from receipt of the email.</p>
Extension Pending	<p>Your Third-Party has requested an extension of the Agreement and it is awaiting your action. You should have received an Extension Request email from SMT. You can accept or reject the Extension Request directly from the email, or login to your SMT account to accept or reject the Agreement Extension from the View &amp; Edit Third-Party Agreement screen.</p> <p>An Extension Request expires after thirty (30) calendar days from receipt of the email.</p> <p> <b>NOTE:</b> This status is only applicable to Energy Data Agreement.</p>
Rejected	You have rejected the Agreement Invitation.
Not Accepted	<p>The Agreement Invitation has expired. You did not take any action to the Agreement Invitation within thirty (30) calendar days from receipt of the email.</p> <p> <b>NOTE:</b> If you have changed your Account Authorization Code recently, you need to provide the new code to the Third-Party to allow them to send you a new invitation.</p>
Close Pending	<p>If you choose to terminate the In-Home Device Agreement when removing the In-Home Device from your Smart Meter, the Agreement will be set to this status while SMT is coordinating with your TDSP to remove the In-Home Device.</p> <p> <b>NOTE:</b> Once your TDSP removes the In-Home Device successfully, the Agreement will be Closed.</p>





Customer Agreement Status Values	
Status	Status Description
Closed	<p>Your Agreement has been terminated by you or your Third-Party.</p> <p>SMT will terminate your Agreement if one of the following occurs:</p> <ul style="list-style-type: none"> <li>▪ If you have a Fixed ESI IDs Energy Data Agreement and your Energy Data Agreement is not associated with at least one ESI ID (e.g. if you have removed the ESI ID associated with your Energy Data Agreement from your SMT account).</li> <li>▪ If you have an In-Home Device Agreement or an In-Home Device Services Agreement and you have moved out.</li> <li>▪ If you have an In-Home Device Agreement or an In-Home Device Services Agreement and the Agreement is not associated with an In-Home Device for thirty (30) calendar days.</li> </ul>
Completed	<p>The Energy Data Agreement has reached the end of the term. Once the Agreement is completed, your Third-Party Service Provider has to create a new Agreement Invitation if you agree to allow them to continue accessing your usage data.</p> <p> <b>NOTE:</b> If you have changed your Account Authorization Code recently, you need to provide the new code to the Third-Party to allow them to send you a new invitation.</p> <p> <b>NOTE:</b> An Energy Data Agreement is active up to twelve (12) months only. If your Energy Data Agreement has an initial duration of less than twelve (12) months, you can extend the Agreement before the Agreement changes to the Completed status.</p> <p> <b>NOTE:</b> This status is only applicable to Energy Data Agreement.</p>

Figure 68: Third-Party Agreement Status Values

9.3.2

[View ESI IDs](#)

SMT Procedure – Viewing ESI IDs associated with an Energy Data Agreement	
Step	Action
	<p> <b>NOTE:</b> Before completing the following step, you must select the desired Energy Data Agreement from your Third-Party Agreement List and display the Agreement on your View &amp; Edit Third-Party Agreement screen. Refer to <i>Section 9.2 Displaying Your Third-Party Agreements</i> to learn how to search for your Agreement.</p>



SMT Procedure – Viewing ESI IDs associated with an Energy Data Agreement	
Step	Action
1	Click ‘View ESIIDs’ button  The list of ESI IDs under the Energy Data Agreement will be displayed.

Figure 69: SMT Procedure – Viewing ESI IDs associated with an Energy Data Agreement



**NOTE:** The View ESI IDs screen only displays up to 500 ESI IDs. If the Energy Data Agreement has more than 500 ESI IDs, you need to export the ESI IDs associated with the Agreement.

SMT Procedure – Exporting ESI IDs associated with an Energy Data Agreement	
Step	Action
1	Click ‘Export all ESIIDs’ button  A new screen will display showing an Order Number for your report request. Your request will be run offline. When the request completes, an email will be sent to the Email Address in your Account Profile. Your report will be attached to that email as a CSV file. For information on retrieving your report, see <i>Section 7.4.1 Retrieving Exported Reports</i>

Figure 70: SMT Procedure – Exporting ESI IDs associated with an Energy Data Agreement



**NOTE:** You cannot remove ESI IDs from an active Energy Data Agreement. If you do not want to allow the Third-Party to access a specific ESI ID that is associated with an active Energy Data Agreement, you have to terminate the Agreement and your Third-Party will need to invite you for a new Energy Data Agreement.

### 9.3.3

#### View Third-Party Usage Report History

When your Third-Party requests a usage report of your ESI IDs, SMT will keep a record of the request. The 3<sup>rd</sup> Party Usage Report History screen will display the type of usage reports the Third-Party requested, the ESI ID requested, date of the request, and the date when SMT completed the request.



SMT Procedure – Viewing Report Requests History associated with an Energy Data Agreement	
Step	Action
	 <b>NOTE:</b> Before completing the following step, you must select the desired Energy Data Agreement from your Third-Party Agreement List and display the Agreement on your View & Edit Third-Party Agreement screen. Refer to <i>Section 9.2 Displaying Your Third-Party Agreements</i> to learn how to search for your Agreement.
1	Click 'View 3 <sup>rd</sup> Party Report History' button  The list of usage reports requested by the Third-Party under the selected Agreement will be displayed.   <b>NOTE:</b> If your Third-Party requested more than 500 reports, SMT will only display the most recent 500 requests. You need to use the 'Export Report' button to export the report request history log.

Figure 71: SMT Procedure – Viewing Report Requests History associated with an Energy Data Agreement

SMT Procedure – Exporting Third-Party Report Request History associated with an Energy Data Agreement	
Step	Action
1	Click 'Export Report' button  A new screen will display providing an Order Number for your report request. Your request will be run offline. When the request completes, an email will be sent to the Email Address in your Account Profile. Your report will be attached in the email as a CSV file. For information on retrieving your report, see <i>Section 7.4.1 Retrieving Exported Reports</i> .

Figure 72: SMT Procedure – Exporting Third-Party Report Request History associated with an Energy Data Agreement

### 9.3.4 [Accepting or Rejecting an Agreement Invitation or Extension Request from Email](#)

When a Third-Party Service Provider initiates a new Agreement, SMT will send you an Agreement Invitation email. When a Third-Party requests an extension of an existing Energy Data Agreement, SMT will send you an Extension Request email for your acceptance or rejection.

If you are a Residential customer and you have a SMT Account, the Agreement Invitation or the Extension Request email will be sent to the email address in your personal profile. If you are a Business customer and your Company has a SMT Account, the Agreement Invitation or the Extension Request email will be sent to the email address in the Company's profile.

If you do not have a SMT Account, the Agreement Invitation email will be sent to the email address the Third-Party Service Provider entered when they initiated the new Agreement.



**NOTE:** If you believe a Third-Party Service Provider initiated an Agreement Invitation but you did not receive the invitation email, contact the Third-Party to verify the email address. The Third-Party Service Provider can resend you the invitation if it has not expired, or initiate a new one if it has expired.

You may accept or reject a new Energy Data Agreement Invitation or Extension Request directly from the email. An Energy Data Agreement Invitation or Extension Request email is associated with only one Agreement. If you accept or reject the invitation or extension request from the email, the Agreement will be accepted or rejected.

An In-Home Device Agreement or In-Home Device Services Agreement Invitation email may be associated with up to five (5) Agreements, one Agreement per device. If you accept or reject an In-Home Device or In-Home Device Services Agreement Invitation from the email, all Agreements associated with the Invitation will be accepted or rejected at the same time.



**NOTE:** If you do not want to accept or reject all the In-Home Devices associated with the Agreement Invitation, you may login to your SMT Account to accept or reject an Agreement one at a time. To learn how to accept or reject a pending Agreement from the SMT portal, refer to *Section 9.3.5 Accepting or Rejecting a Pending or Extending Pending Agreement*.

You have thirty (30) calendar days to accept or reject an Agreement Invitation. Once the acceptance window expires, your Agreement Invitation email will become inactive and the Agreement Status will be changed to Not Accepted.




You have up to thirty (30) calendar days or the expiration date of the existing Energy Data Agreement to accept or reject the Extension Request, whichever comes first. The Agreement will expire if the current term ends before the 30-calendar-day acceptance period and you do not take any action. If the remaining term of the Agreement is longer than thirty (30) calendar days, the Extension Request email will become inactive after thirty (30) calendar days and the Agreement Status will return to Active.

If you accept the extension request, the duration of your Agreement will be updated. If you reject the extension request, the duration of the Agreement will remain unchanged. The Agreement Status will return to Active.

To learn more about the Agreement Status, refer to *Section 9.3.1 Third-Party Agreement Status*.



**NOTE:** You and your Third-Party Service Provider will receive an email from SMT to confirm your acceptance or rejection of the Agreement Invitation or the Extension Request.

SMT Procedure – Accepting or Rejecting Agreement Invitation or Extension Request from Email	
Step	Action
1	<p>Open your Agreement Invitation email in your mail box.</p> <p>If you want to accept the Agreement Invitation or Extension Request, <a href="#">Go to Step 2.</a></p> <p>If you want to reject the Agreement Invitation or Extension Request, <a href="#">Go to Step 3.</a></p>
2	<p><b>From Step 1</b></p> <p>Click ‘Accept’ or ‘Register for an SMT Account’ button</p> <p>If you have a SMT Account, click the ‘Accept’ button in the email. A new browser window will be opened and you will be directed to the SMT Home Page to login to your account. Once you successfully login to your account, an Agreement Acceptance or Agreement Extension Confirmation screen will be displayed.</p> <p> <b>NOTE:</b> If you do not login to SMT through the browser window opened by the email, the acceptance will not be confirmed. You will need to go back to the invitation email and click the ‘Accept’ button again, or you can go to the View &amp; Edit Agreement screen to accept the agreement. To learn how to accept or reject a pending Agreement from the SMT portal, refer to <i>Section 9.3.5 Accepting or Rejecting a Pending or Extending Pending Agreement.</i></p> <p>If you do not have a SMT Account, click the ‘Register for an SMT Account’ button in the email. A new browser window will be opened and you will be directed to the SMT New Account Registration form. Complete the registration form for a new SMT Account. Once you receive your new SMT Account email notification and successfully login to SMT for the first time, the Agreement(s) associated with the Invitation email will be accepted. An Agreement Acceptance Confirmation screen will be displayed.</p> <p> <b>NOTE:</b> The 14-calendar-day window given for a newly registered user to login to the SMT portal will not extend the Agreement Acceptance period. If you do not complete the SMT Registration process within the 30-calendar-day window, the Agreement Invitation will expire.</p> <p> <b>NOTE:</b> If the Agreement Invitation expires before you complete the registration process, you need to login to your new SMT Account and obtain your Account Authorization Code from your Account Profile before contacting the Third-Party Service Provider to initiate a new Agreement.</p>



SMT Procedure – Accepting or Rejecting Agreement Invitation or Extension Request from Email	
Step	Action
3	<p><b>From Step 1</b></p> <p>Click 'Reject' or 'Reject Request' button</p> <p>If you have a SMT Account:</p> <ul style="list-style-type: none"> <li>• Click the 'Reject' button in the email.</li> <li>• A new browser window will be opened and you will be directed to the SMT Home Page. You must login to your account at this time to confirm the rejection.</li> <li>• A survey form will be displayed once you successfully login to your account. Choose the reason why you reject the Agreement Invitation or select the 'Skip / Don't want to provide' option.</li> <li>• An Agreement Rejection Confirmation or Extension Rejection Confirmation will be displayed after you click the 'Send Feedback' button on the survey form.</li> </ul> <p> <b>NOTE:</b> If you do not login to SMT through the browser window opened by the email, the rejection will not be confirmed. You will need to go back to the invitation email and click the 'Reject' button again, or you can go to the View &amp; Edit Agreement screen to reject the agreement. To learn how to accept or reject a pending Agreement from the SMT portal, refer to <i>Section 9.3.5 Accepting or Rejecting a Pending or Extending Pending Agreement</i>.</p> <p>If you do not have a SMT Account:</p> <ul style="list-style-type: none"> <li>• Click the 'Reject Request' button in the email.</li> <li>• A new browser window will be opened and a survey form will be displayed. Choose the reason why you reject the Agreement Invitation or select the 'Skip / Don't want to provide' option.</li> <li>• An Agreement Rejection Confirmation will be displayed after you click the 'Send Feedback' button on the survey form.</li> </ul> <p> <b>NOTE:</b> If you have rejected the Agreement Invitation in error, contact the Third-Party Service Provider to request a new Agreement Invitation.</p>

Figure 73: SMT Procedure – Accepting or Rejecting Agreement Invitation or Extension Request from Email

## 9.3.5

## Accepting or Rejecting a Pending or Extending Pending Agreement

If you have a SMT Account, you may accept or reject a Pending or Extension Pending Agreement from the View & Edit Third-Party Agreement screen.



SMT Procedure – Accepting or Rejecting a Pending or Extension Pending Agreement	
Step	Action
	 <b>NOTE:</b> Before completing the following step, you must select the desired Agreement from your Third-Party Agreement List and display the Agreement on your View & Edit Third-Party Agreement screen. Refer to <i>Section 9.2 Displaying Your Third-Party Agreements</i> to learn how to search for an Agreement.
1	<p>Click 'Accept Agreement' or 'Reject Agreement' button</p> <p>If you click 'Accept Agreement':</p> <ul style="list-style-type: none"> <li>You will receive a confirmation on the screen that the Agreement is accepted or extended.</li> <li>The Agreement Status will be changed to Active.</li> </ul> <p>If you click 'Reject Agreement':</p> <ul style="list-style-type: none"> <li>A survey window will be opened. Choose the reason why you rejected the Agreement or select the 'Skip / Don't want to provide' option.</li> <li>Click the 'Send Feedback' button on the survey window.</li> <li>You will return to the View &amp; Edit 3<sup>rd</sup> Party Agreement screen and receive a confirmation that the Agreement or Extension Request is rejected.</li> </ul> <p> <b>NOTE:</b> If you accepted a Pending Agreement in error, you need to terminate the Agreement. If you rejected a Pending Agreement in error, contact the Third-Party Service Provider to request a new Agreement Invitation.</p>

Figure 74: SMT Procedure – Accepting or Rejecting a Pending or Extension Pending Agreement

## 9.3.6

## Extending an Energy Data Agreement

An Energy Data Agreement has a maximum duration of twelve (12) months. Once the Agreement reaches the end of its term, your Third-Party Service Provider must create a new Agreement.

If the Energy Data Agreement is less than twelve (12) months in duration and it has at least one (1) ESI ID associated with it, you can extend the Agreement at any time before it expires and do not need the approval of your Third-Party Service Provider to approve the extension.

For example, your Energy Data Agreement is eight (8) months in duration. You may extend this Agreement for up to four (4) months.



**NOTE:** You can extend an Energy Data Agreement multiple times, until the Agreement reaches the maximum duration of twelve (12) months.

Your Third-Party Service Provider may request an extension of the Energy Data Agreement. You must approve the extension request for the extension to take effect.

To learn how to accept or reject an Extension Request from your Third-Party Service Provider, refer to *Section 9.3.4 Accepting or Rejecting an Agreement Invitation or Extension Request from Email* and *9.3.5 Accepting or Rejecting a Pending or Extending Pending Agreement*.



**NOTE:** If the original term of the Agreement is twelve (12) months or the Agreement has been extended to twelve (12) months, the Extension Request function will not be available to you or your Third-Party Service Provider.



SMT Procedure – Extending an Energy Data Agreement	
Step	Action
	 <p><b>NOTE:</b> Before completing the following steps, you must select the desired Agreement from your Third-Party Agreement List and display the Agreement on your View &amp; Edit Third-Party Agreement screen. Refer to <i>Section 9.2 Displaying Your Third-Party Agreements</i> to learn how to search for your Agreement.</p>
1	<p><i>Extend Agreement By (required)</i></p> <p>Select from the dropdown the number of months you wish to extend the Agreement. For example, if your Agreement currently has a duration of eight (8) months, you can select one of these options: one (1) month, three (3) months, or up to one (1) year.</p>
2	<p>Click 'Extend Agreement' button</p> <p>A confirmation will be displayed on the screen that your Agreement has been extended.</p>  <p><b>NOTE:</b> The 'Extend Agreement' button is only available for an Energy Data Agreement that has at least one (1) ESI ID.</p>

Figure 75: SMT Procedure – Extending an Energy Data Agreement

### 9.3.7

### Terminating an Agreement

You can terminate an Energy Data Agreement or In-Home Device Services Agreement at any time without your Third-Party Service Provider's approval, if the Agreement Status is Pending, Extension Pending, or Active. SMT will send your Third-Party Service Provider a notification email if you terminated an Agreement.

Once the Agreement is terminated, your Third-Party Service Provider needs to create a new Agreement invitation to regain their access.

You can only terminate an In-Home Device Agreement when you remove the In-Home Device. Refer to *Section 12.3 Removing In-Home Devices* to learn how to remove an In-Home Device and terminate the associated In-Home Device Agreement.



**NOTE:** A Third-Party Service Provider can terminate your Agreement at any time without your approval. SMT will send you a notification email if the Third-Party Service Provider terminated an Agreement.

SMT Procedure – Terminating an Energy Data Agreement or In-Home Device Services Agreement	
Step	Action
<p><b>NOTE:</b> Before completing the following step, you must select the desired Agreement from your Third-Party Agreement List and display the Agreement on your View &amp; Edit Third-Party Agreement screen. Refer to <i>Section 9.2 Displaying Your Third-Party Agreements</i> to learn how to search for your Agreement.</p>	
1	Click 'Terminate Agreement' button  A confirmation will be displayed on the screen that your Agreement has been terminated.

Figure 76: SMT Procedure – Terminating an Energy Data Agreement or In-Home Device Services Agreement

## 9.4 View Third-Parties' Rating

Customers may rate the services provided by a Third-Party Service Provider. There are five (5) Rating levels in SMT:

- 1 – Poor
- 2 – Needs Improvement
- 3 – Average
- 4 – Good
- 5 - Excellent

SMT calculates an Overall Ratings of the Third-Party based on all the individual customers' ratings. This Third-Party Overall Ratings will be displayed on the Agreement Invitation email and the Agreement screen.

Figure 77 shows an example of a Third-Party's Overall Ratings on the View & Edit 3<sup>rd</sup> Party Agreement screen.



Figure 77: Third-Party’s Overall Rating – View & Edit 3<sup>rd</sup> Party Agreement Screen

If you have an active Agreement, you can view their most current overall ratings of the Third-Party.


SMT Procedure – Viewing Third-Party’s Overall Ratings	
Step	Action
 <p><b>NOTE:</b> Before completing the following step, you must select the desired Agreement from your Third-Party Agreement List and display the Agreement on your View &amp; Edit Third-Party Agreement screen. Refer to <i>Section 9.2 Displaying Your Third-Party Agreements</i> to learn how to search for your Agreement.</p>	
1	<p><i>Customer Rating of 3<sup>rd</sup> Party</i></p> <p>Click the hyperlink labeled ‘(X Customers Rated)’. A new screen will be displayed.</p>

Figure 78: SMT Procedure – Viewing Third-Party’s Overall Rating

### 9.4.1 Submit your Third-Party Rating

If you have an active Agreement of any type, you may submit your rating of the Third-Party at any time before the Agreement expires, closes or terminates. You may rate the Third-Party multiple times. However, SMT only displays the last rating you submitted and uses it in the calculation of the Third-Party’s overall rating.


SMT Procedure – Submitting your Third-Party Rating	
Step	Action
 <b>NOTE:</b> Before completing the following steps, you must select the desired Agreement from your Third-Party Agreement List and display the Agreement on your View & Edit Third-Party Agreement screen. Refer to <i>Section 9.2 Displaying Your Third-Party Agreements</i> to learn how to search for your Agreement.	
1	<i>My Ratings (required)</i> Select the rating from the dropdown.
2	Click 'Submit Rating' button A confirmation will be displayed that your Rating of the Third-Party has been submitted.

Figure 79: SMT Procedure – Submitting your Third-Party Rating

## 10 Managing My Friends

If you have a Residential Account you may grant access to view your Smart Meter Usage Information to up to five (5) Friends; these Friends may or may not have an existing Residential Account in SMT when you invite them; if they do not have a Residential Account, they will have to create a Friend Account.

Similarly, you may also be granted access to view the Smart Meter Usage Information of up to five (5) Friends who already have a Residential Account in SMT.

This section shows how to invite and manage the Friends that you want to grant access to your Smart Meter; *Section 11 My Friends' Smart Meters* shows how to accept invitations from the Friends that have granted you access to see their Smart Meter.

### 10.1 Displaying Your Friends' List (Friends that you invited to see your data)

Your Friends' List displays the Friends that you have invited to view your Smart Meter's Usage Information through SMT.

SMT Procedure – Displaying your Friends' List (Friends that you invited to see your data)	
Step	Action
1	Navigate to the 'Agreements' tab
2	Select 'My Friends' from the left menu  The page displays a list of the Friends that you have invited to see your data through SMT.

Figure 80: Displaying your Friends' List (Friends that you invited to see your data)

Figure 81 shows an example of how your Friends' List will be displayed:

<input type="checkbox"/>	Agreement	Friend Name	Friend Email	Start Date	Status	Agreement Key
<input type="checkbox"/>	1234567-00000	Doe, John	johndoe@anonymous.com	4/28/10	Active	
<input type="checkbox"/>	1234572-00000		jackson@solutions.com	5/1/10	Pending	rtyefh

Figure 81: My Friends' List (Friends that you invited to see your data)

To learn more about what each of the columns in the Friends' List represent, view *Step 10* of *Section 10.2 Adding a Friend*.

### 10.2 Adding a Friend

SMT Procedure – Adding a Friend	
Step	Action
1	Navigate to the 'Agreements' tab
2	Select 'My Friends' from the left menu
3	Click 'Add a Friend' button
4	<i>Friend's Email Address</i> (required) Enter your Friend's Email Address
5	<i>Re-enter Friend's Email Address</i> (required) Confirm your Friend's Email Address
6	If you have only one Smart Meter associated to your account <b>go to Step 7</b> . If you have more than one Smart Meter associated to your account <b>go to Step 8</b> .
7	<b>From Step 6</b> Click "Add a Friend" button – <b>go to Step 11</b> to see what happens next. The one Smart Meter associated to your account has been added to the Agreement with your Friend automatically.
8	<b>From Step 6</b> Click 'Next" button.
9	Select the Smart Meters that you want your Friend to have access to. You have to select at least one Smart Meter from your list before you can send your invitation.
10	Click 'Submit' button.


SMT Procedure – Adding a Friend	
Step	Action
11	<p><b>From Step 7</b></p> <p>Your Friend will now show in your Friends’ List Table. This Table includes the following columns:</p> <ul style="list-style-type: none"> <li>• <i>Agreement</i>: SMT assigns automatically a Number to identify this Friend Agreement.</li> <li>• <i>Friend Name</i>: shows your Friend’s Name once he accepts the invitation.</li> <li>• <i>Friend Email</i>: shows your Friend’s Email Address.</li> <li>• <i>Created</i>: shows the date when you added this Friend.</li> <li>• <i>Status</i>: indicates whether this Friend is:                             <ul style="list-style-type: none"> <li><i>Active</i>: your Friend has accepted your invitation and is now able to see your Smart Meter’s data</li> <li><i>Pending</i>: your Friend has not accepted your invitation yet; your Friend can not see your Smart Meter’s data until he accepts the invitation.</li> </ul> </li> </ul> <p><i>Agreement Key</i>: shows the Agreement Key that was sent in the email invitation to your Friend. The Agreement Key will only be displayed when the Status of the Agreement is ‘<i>Pending</i>’. This Agreement Key is what your Friend needs to use to accept your invitation.</p>
12	<p>Your Friend receives an email invitation to become your Friend in SMT. This invitation contains an Agreement Key that SMT generates and which your Friend needs to use to accept your invitation.</p> <p> <b>NOTE:</b> Your Friend has to accept the invitation within 14 days or the invitation will expire.</p>

Figure 82: SMT Procedure – Adding a Friend

### 10.3 Editing My Friend Agreement

If you have more than one Smart Meter associated to your account you can decide which of those meters your Friend will be able to see. You may add or remove Smart Meters from your Friend Agreement anytime.

SMT Procedure – Editing My Friend Agreement	
Step	Action
1	Navigate to the ‘Agreements’ tab.



SMT Procedure – Editing My Friend Agreement	
Step	Action
2	Select 'My Friends' from the left menu. The Table shows the list of your Friends
3	Select the checkbox that corresponds to the Friend Agreement you want to modify.  <b>NOTE:</b> You may only modify one Friend Agreement at a time.
4	Click 'Edit Agreement' button This Table shows the Smart Meters that <b>ARE</b> part of the Agreement with your Friend. If you have additional Smart Meters that you want your Friend to see go to Step 5. If you want to remove Smart Meters from this Agreement with your Friend so that he can not see the usage data anymore, select the checkboxes next to the Smart Meters that you want to remove and go to Step 8.
5	<b>From Step 4</b> Click 'Add a Meter to Agreement' button. This Table shows the Smart Meters that <b>ARE NOT</b> part of the Agreement with your Friend.
6	Select the checkboxes for the Smart Meters that want your Friend to see.
7	Click 'Add Meters to Agreement' button. The selected meters will be added to the agreement and your Friend will now be able to see usage information for those meters.  <b>NOTE:</b> You must first associate a Smart Meter with your account before you can add it to a Friend Agreement. If you need to associate a new Smart Meter to your account, select My Smart Meters from the left navigation menu.
8	Click 'Remove Meter' button. Your Friend will no longer be able to see the usage information for the Smart Meters you removed from the Agreement. This action does not remove the Smart Meters from your account.

Figure 83: SMT Procedure – Editing My Friend Agreement

## 10.4 Removing a Friend

If you no longer want a Friend to have access to any of your Smart Meter's data, you may remove your Friend.


SMT Procedure – Removing a Friend	
Step	Action
1	Navigate to the 'Agreements' tab.
2	Select 'My Friends' from the left menu.
3	Select the checkbox that corresponds to the Friend Agreement you want to remove.
4	<p>Click 'Remove Friend' button</p> <p>You will still have access to your Smart Meter data but your Friend will not have access anymore.</p> <p> <b>NOTE:</b> An email will be sent to your Friend notifying him that his access to your Smart Meters has been removed.</p>

Figure 84: SMT Procedure – Removing a Friend

## 11 My Friends' Smart Meters

Your Friends with Residential Accounts in SMT may grant you access to view their Smart Meter's Usage Information. You may be a Friend to up to five (5) SMT Users.

After your Friend adds you as a Friend in SMT you will receive an email invitation with instructions on how to accept the invitation so that you can start seeing your Friend's Smart Meters.



**NOTE:** The Friends that you invite to view your Usage Information and the Friends that invite you to view their Usage Information **MAY OR MAY NOT** be the same. For example, you can invite 5 family members to see your Usage, and have 5 friends from college invite you to view their Usage.

### 11.1 Receiving an Invitation to become a Friend in SMT

The email invitation that you receive to become a Friend in SMT contains an Agreement Key that you need to use to accept the invitation.

If you already have an SMT Residential Account, go to *Section 11.4 Accepting a Pending Invitation from a Friend* for information about how to accept your Friend's invitation.

If you do not have an SMT Residential Account and you do not have a Smart Meter at your premise, you may register for a Friend Account in SMT. Continue to *Section 11.2 Registering for a Friend Account* for information about how to create a Friend Account in SMT.




**NOTE:** You must accept the invitation within 14 days or the invitation will expire. Your Friend will have to send you a new invitation.

### 11.2 Registering for a Friend Account

SMT Procedure – Registering for a Friend Account	
Step	Action
1	From your browser, go to the SMT website <a href="http://www.SmartMeterTexas.com">www.SmartMeterTexas.com</a>
2	Click 'New User Register' button
3	Click 'Friends' from the dropdown
4	<i>First Name</i> (required) Enter your first name.
5	<i>Middle Initial</i> Enter your middle initial.



SMT Procedure – Registering for a Friend Account	
Step	Action
6	<p><i>Last Name</i> (required)</p> <p>Enter your last name.</p>
7	<p><i>Suffix</i></p> <p>Enter any name suffix (Jr, Sr, III).</p>
8	<p><i>Phone</i></p> <p>Enter your preferred contact phone number.</p>
9	<p><i>Email Address</i> (required)</p> <p>Enter your email address where you received the invitation to become a Friend. When registration is complete, your temporary password will be sent to this email address.</p> <p> <b>NOTE:</b> It is necessary that you register with the email address where you received the invitation to become a Friend so that SMT validates your identity. Once you receive your temporary password and you login to SMT for the first time, you can change your email address in your Profile.</p>
10	<p><i>Re-enter Email Address</i> (required)</p> <p>This entry must exactly match the previous entry for <i>Email Address</i>.</p>
11	<p><i>Language Preference</i> (required)</p> <p>Select your preferred language. SMT currently supports both English and Spanish languages for Friend Accounts. The default language preference is English.</p>
12	<p><i>User ID</i> (required)</p> <p>Create a User ID for your Account. User ID must be at least 5 and no more than 100 characters in length and cannot contain slashes (/), single quote marks (') or double quote marks ("). User IDs are not case sensitive.</p>
13	<p><i>Agreement Key</i> (required)</p> <p>You must enter the Agreement Key that is contained in the email invitation you received in order to complete the Registration process. If you cannot find your Agreement Key, contact your Friend who sent you the invitation, The agreement key is available to Your Friend on their SMT account. This Agreement Key will not be accessible once you complete the registration process.</p>
14	<p><i>Terms and Conditions</i> (required)</p> <p>You must agree to the stated Terms and Conditions in order to access SMT.</p>

SMT Procedure – Registering for a Friend Account	
Step	Action
15	Click ‘Create Account’  If all required fields have been entered successfully, a confirmation will be displayed. You will receive an email notice that will contain the temporary password for your Account.

Figure 85: SMT Procedure – Registering for a Friend Account



**NOTE:** Once you have registered for a Friend Account you may use this same Account to accept invitations from other friends, you do not need to register another account. Go to *Section 11.4 Accepting a Pending Invitation from a Friend* to learn how to accept additional invitations once you already have a Friend Account.

Refer to *Section 11.5 Viewing the Smart Meters of a Friend Agreement* to learn how to find out which Smart Meters you have access to. Refer to *Section 11.7 Viewing your Friend’s Usage Information* to learn how to access the Usage Information for those Smart Meters.

### 11.3 Displaying Your Friends’ List (Friends who invited you to see their data)

Your Friends’ List displays the Friends that have invited you to view their Smart Meter’s data through SMT.

SMT Procedure – Displaying your Friends’ List (Friends who invited you to see their data)	
Step	Action
1	Navigate to the ‘Agreements’ tab
2	Select ‘My Friends’ Agreements’ from the left menu  The page displays a list of the Friends that have invited you to see their data through SMT.

Figure 86: Displaying your Friends’ List (Friends who invited you to see their data)

Figure 87 shows an example of how your Friends’ List will be displayed:

<input type="checkbox"/>	Agreement	Friend Name	Friend Email	Created	Status
<input type="checkbox"/>	1234567-00000	Doe, John	johndoe@anonymous.com	4/28/10	Active

Figure 87: My Friends’ List (Friends who invited you to see their data)

## 11.4 Accepting a Pending Invitation from a Friend

If you already have a Residential or a Friend Account in SMT you can accept invitations from your Friends using your current account.



**NOTE:** You may have a maximum of five (5) Friends that grant you access to see their Usage Information. After you have 5 Friends, you must first remove a Friend before you can accept another pending Friend.

SMT Procedure – Accepting a Pending Invitation from a Friend	
Step	Action
1	Navigate to the 'Agreements' tab
2	Select 'My Friends' Agreements' from the left menu
3	Click 'Accept Pending Friend' button
4	<p><i>Agreement Key</i> (required)</p> <p>You must enter the Agreement Key that was sent to you in the email invitation in order to accept your pending invitation. If you cannot find your Agreement Key, call the Friend who sent you the invitation, he is able to view the Agreement Key in his SMT Account until you accept the invitation.</p>
5	<p>Select 'Accept Friend' button</p> <p>Once you accept the invitation will be able to see your new Friend in your Friend's List. This Table is composed by the following columns:</p> <ul style="list-style-type: none"> <li>• <i>Agreement:</i> SMT assigns automatically a Number to identify this Friend Agreement.</li> <li>• <i>Friend Name:</i> shows the name of the Friend who invited you.</li> <li>• <i>Friend Email:</i> shows your Friend's Email Address.</li> <li>• <i>Created:</i> shows the date when your Friend invited you.</li> <li>• <i>Status:</i> the status of a Friend that appears on your list is always <i>Active</i>.</li> </ul> <p>As soon as you accept the invitation you may view your Friend's Smart Meter, go to <i>Section 11.5 Viewing the Smart Meters of a Friend Agreement</i> to see how you can find out which Smart Meters you have access to; then go to <i>Section 11.7 Viewing your Friend's Usage Information</i> to see how you can access the Usage Information for those Smart Meters.</p>

Figure 88: Accepting a Pending Invitation from a Friend

## 11.5 Viewing the Smart Meters of a Friend Agreement

Follow these steps to see which of his Smart Meters your Friend has authorized you to view:

SMT Procedure – Viewing the Smart Meters of a Friend Agreement	
Step	Action
1	Navigate to the 'Agreements' tab
2	Select 'My Friends' Agreements' from the left menu
3	Select the checkbox that corresponds to the Friend Agreement that you want to see.
4	Click 'View Meters' button  The table shows a list of the Smart Meters that your Friend has authorized you to view.

Figure 89: Viewing the Smart Meters of a Friend Agreement

## 11.6 Removing a Friend (a Friend who invited you)

If you no longer wish to have access to a Friend's Smart Meters you may remove your Friend.

SMT Procedure – Removing a Friend	
Step	Action
1	Navigate to the 'Agreements' tab.
2	Select 'My Friends' Agreements' from the left menu.
3	Select the checkbox that corresponds to the Friend Agreement you want to remove
4	Click 'Remove Friend' button  You will not have access to your Friend's Smart Meters anymore.

Figure 90: SMT Procedure – Removing a Friend

## 11.7 Viewing your Friend's Usage Information

For more detailed information on how to View the Usage Information for your Friend's Smart Meters go to *Section 8 Creating Usage Reports*. The following procedure describes the basic navigation steps to access the page where you will be able to Create Usage Reports for your Friend's Smart Meters.


SMT Procedure – Viewing your Friend’s Usage Information	
Step	Action
1	Navigate to the ‘Usage’ tab
2	Select ‘My Friends’ Usage’ from the left menu  <b>NOTE:</b> If you only have access to one of your Friend’s meters, the usage will automatically display. If you have access to more than one of your friend’s meters, you must select the meter you wish to see usage on.

Figure 91: SMT Procedure – Viewing your Friend’s Usage Information

## 12 Managing In-Home Devices

An In-Home Device, also known as HAN (Home Area Network) Device, is a piece of equipment with the capability to display usage information and/or receive informational messages and commands from your Retail Electric Provider to help you manage and control your energy consumption. Examples of HAN Devices include in-home display, programmable communicating thermostats, and smart appliances.

You may add and remove In-Home Devices to your Smart Meters through SMT.



**NOTE:** In-Home Device Authorization is required to perform In-Home Device Functions. If you have a Residential Account you have the In-Home Device Authorization automatically. If you have a Business Account and you are an Administrator, you have the In-Home Device Authorization automatically. If you have a Business User Account you must receive authorization from your Company's Administrator. See *Section 4 Managing Accounts for Your Company* for details about granting In-Home Device Authorization.

If you have a Friend Account, you do not have access to In-Home Device Functions.

Contact your Third-Party Service Providers to learn more about how to obtain and install an In-Home Device in your property.

### 12.1 Displaying Your In-Home Device List

You can view the In-Home Devices you or your Third-Party Service Providers have added to your Smart Meters through SMT. You need to display your In-Home Device List to be able to manage your devices.

If you only have one (1) Smart Meter associated with your Account, the list of In-Home Devices associated with your Smart Meter will be displayed automatically.

If you have more than one (1) Smart Meters associated with your Account, SMT will display the list of In-Home Devices associated with your Default Meter on the In-Home Devices screen when you login to your Account.

To view the list of In-Home Devices of a different Smart Meter, click the hotlink on the breadcrumb to display your Meter List to select a different Smart Meter. Figure 92 shows an example of a Meter List when displayed in SMT.

	Description▼	Service Address▼	City▼	State▼	ESI ID▼	Meter Number▼
<input type="checkbox"/>	Cool Meter	1234 TEST DR	HOUSTON	TX	99999990000000459	12345876
<input type="checkbox"/>	Cool Meter 2	4321 TEST DR	DALLAS	TX	99999990000009054	67854321

Figure 92: Meter List – My In-Home Devices

If you have 25 or fewer Smart Meters associated with your Account, your Meter List will automatically display. If you have more than 25 Smart Meters, you will need to search for meters to display in your list.

SMT Procedure – Displaying Your Meter List (25 or fewer Smart Meters) – My In-Home Devices	
Step	Action
1	Navigate to the 'In-Home Devices' tab
2	Select 'My In-Home Devices' from the left menu
3	Click 'My Meters' link on the breadcrumb
4	<i>Select checkbox</i> (required) Select the checkbox next to a Smart Meter. You may view information for only one (1) Smart Meter at a time.
5	Click the 'View In-Home Devices' button SMT will display a list of In-Home Devices that have been added to the selected Smart Meter.

Figure 93: SMT Procedure – Displaying Your Meter List (25 or fewer Smart Meters) – My In-Home Devices

### 12.1.1

### Searching for Meters – My In-Home Devices

If you have more than 25 Smart Meters associated with your Account, you will see a Search screen. You must search for a specific Smart Meter or a group of Smart Meters to populate the Meter List. You may also select the link 'Show All' to display all the Smart Meters associated with your Account.



**NOTE:** If you have more than 500 Smart Meters associated with your Account, the 'Show All' link will not appear. In this case, you must search for a specific meter or group of meters. If visible, you may click the link 'Show All' to populate your Meter List.

SMT Procedure – Displaying Your Meter Devices (Show All) – My In-Home Devices	
Step	Action
1	Navigate to the 'In-Home Devices' tab
2	Select 'My In-Home Devices' from the left menu
3	Click 'My Meters Search' link on the breadcrumb
4	Click 'Show All' link
5	<i>Select checkbox</i> (required) Select the checkbox next to a Smart Meter. You may view information for only one (1) Smart Meter at a time.

SMT Procedure – Displaying Your Meter Devices ( <i>Show All</i> ) – My In-Home Devices	
Step	Action
6	<p>Click the ‘View In-Home Devices’ button</p> <p>SMT will display a list of In-Home Devices that have been added to the selected Smart Meter</p>

Figure 94: SMT Procedure – Displaying Your Meter List (*Show All*) – My In-Home Devices

SMT Procedure – Displaying Your Meter List ( <i>Search for Meters</i> ) – My In-Home Devices	
Step	Action
1	Navigate to the ‘In-Home Devices’ tab
2	Select ‘My In-Home Devices’ from the left menu
3	Click ‘My Meters Search’ hotlink on the breadcrumb
4	<p><i>Select type of meter identifier</i> (required)</p> <p>Select to search by either ESI ID or Meter Number</p>
5	<p><i>Type one or more meter numbers</i> (required)</p> <p>Enter up to 100 ESI IDs or Meter Numbers (but not both) to correspond with your search type. Values should be separated by a comma (,).</p> <p>You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: 123*, 1*23, or *123).</p> <p>123* shows all ESI IDs/Meter Numbers that begin with ‘123’</p> <p>1*23 shows all ESI IDs/Meter Numbers that begin with ‘1’ and end with ‘23’</p> <p>*123 shows all ESI IDs/Meter Numbers that end with ‘123’</p> <p>You can only use one wildcard/asterisk in a given search. If you use a wildcard, you may not enter other ESI IDs or meter numbers.</p>
6	<p>Click ‘Search’ button</p> <p>The Search will look for the specified meters among the Smart Meters that are associated with your Account.</p>
7	<p><i>Select checkbox</i> (required)</p> <p>Select the checkbox next to a Smart Meter. You may view information for only one (1) Smart Meter at a time.</p>
8	<p>Click the ‘View In-Home Devices’ button</p> <p>SMT will display a list of In-Home Devices that have been added to the selected Smart Meter.</p>

Figure 95: SMT Procedure – Displaying Your Meter List (*Search for Meters*) – My In-Home Devices





**NOTE:** You can have a maximum of five (5) In-Home Devices for each Smart Meter associated with your Account.


The ESI ID History table on your In-Home Devices screen will show you the In-Home Devices that have been removed from the Smart Meter and Add/Remove requests that have failed in the last ten (10) calendar days. This is for informational purposes only. After ten (10) calendar days of the event, you can view this information through the View In-Home Device History screen. This information is stored for up to 13 months after an In-Home Device has been removed or the add/remove request has failed.

Refer to the section Adding In-Home Devices and Removing In-Home Devices to learn more about the definition of the different In-Home Device Statuses.

## 12.2 Adding In-Home Devices

You or your authorized Third-Party Service Providers have the capability to add In-Home Devices to your Smart Meters through SMT.

Before you add an In-Home Device to your Smart Meter, make sure you have reviewed the manufacturer's instructions to install and operate your new In-Home Device.

SMT Procedure – Adding In-Home Devices	
Step	Action
1	From the In-Home Devices List Screen, click 'Add an In-Home Device' button   <b>NOTE:</b> An ESI ID can have up to 5 In-Home Devices. If the ESI ID already has 5 In-Home Devices, the Add an In-Home Device button will be disabled.
2	<i>Device Description</i>  Enter an optional name for this In-Home Device that will help you remember what the device is or where the device is located (e.g., "Den Thermostat").
3	<i>Type of In-Home Device (required)</i>  Select the type of In-Home Device from the dropdown menu.
4	<i>MAC Address (required)</i>  Enter a valid MAC Address, which should be provided with the Device. The MAC Address contains hexadecimal characters only, this means that the MAC Address contains the following letters only: ABCDEF, and the following numbers: 0123456789. An example of a MAC Address is: 001BC5007000052B. If you cannot find the MAC Address contact the device manufacturer.


SMT Procedure – Adding In-Home Devices	
Step	Action
5	<p><i>Installation Code (required)</i></p> <p>Enter a valid Installation Code, which should be provided with the Device. The Installation Code contains hexadecimal characters only, this means that the Installation Code contains the following letters only: ABCDEF, and the following numbers: 0123456789. An example of an Installation Code is: 83FED3407A939723A5C639B26916D505C3B5. The installation code can have a maximum of 36 characters. If you cannot find the Installation Code contact the device manufacturer.</p>
6	Select the 'Add In-Home Device' button
7	<p>Review the Add Request Confirmation Page</p> <p>The process to add an In-Home Device to your Smart Meter may take some time. Once you click OK to confirm the Add Request, you will be directed to the In-Home Device List page. You will find the status of your In-Home Device displayed in the last column of the table.</p> <p> <b>NOTE:</b> Some devices require you to take action (e.g., press a button on the device) for the request to be completed. If the status of your In-Home Device in SMT is Meter Ready, check the installation guide of your In-Home Device and follow the instructions to complete the process.</p> <p>The Add an In-Home Device process is complete when the status of your In-Home Device in SMT is Device Added.</p>

Figure 96: SMT Procedure – Adding HAN Devices

Your In-Home Device List will show the status of each In-Home Device associated with your Account. Figure 97 defines the various status messages that may show on your In-Home Device List when you request to add an In-Home Device.

HAN Device Status Descriptions – Add a HAN Device	
Status	Status Description
Add Acknowledged	A request to add this In-Home Device was sent by you or by your authorized Third-Party Service Provider and has been received by SMT.
Add Pending	The Add Request has been sent by SMT and has been received by your Electric Utility Company.

HAN Device Status Descriptions – Add a HAN Device	
Status	Status Description
<i>Meter Ready</i>	<p>The Smart Meter is ready to communicate with the In-Home Device. The In-Home Device is ready for your action. Your authorized Third-Party Service Provider may advise you to press the button on your In-Home Device to establish communication between your In-Home Device and your Smart Meter. You may also review the In-Home Device manufacturer’s User Guide and follow the instructions to complete the Add Process.</p> <p>If you need help with this action, contact your Third-Party Service Provider.</p>
<i>Device Added</i>	<p>The In-Home Device has been successfully Added and is ready to display usage or receive messages from your Retail Electric Provider (functionality varies per In-Home Device, please consult the In-Home Device’s user guide to learn more about the specific functions of your device)</p>
<i>Add Failed</i>	<p>The request to Add an In-Home Device has failed. You may try to add the device again.</p>

Figure 97: In-Home Device Status Descriptions – Add an In-Home Device

### 12.3 Removing In-Home Devices

You or your authorized Third-Party Service Providers have the capability to remove In-Home Devices that have been added to your Smart Meters through SMT.

SMT Procedure – Removing HAN Devices	
Step	Action
1	From the In-Home Devices List Screen, select an In-Home Device
2	<p>Click ‘Remove In-Home Device’ button</p> <p>If your In-Home Device is associated with an active In-Home Device Agreement, you will receive a pop-up window asking if you would like to keep the associated In-Home Device Agreement or terminate it. Select the option, and then click the ‘Continue’ button. A new page will be displayed.</p>
3	<p><i>Reason for Removing</i> (required)</p> <p>Select the reason of removing the device from the dropdown.</p>
4	<p><i>Comments</i></p> <p>You may provide optional comments.</p>
5	Click ‘Remove In-Home Device’ button

SMT Procedure – Removing HAN Devices	
Step	Action
6	<p>Review the Remove Request Confirmation Page</p> <p>The process to Remove an In-Home Device from your Smart Meter may take some time. The Remove an In-Home Device process is complete when the status of your In-Home Device in SMT is Device Removed. You can find the status displayed in the lower portion of the List of In-Home Devices page.</p>

Figure 98: Removing In-Home Devices

Your In-Home Device List will show the status of each In-Home Device associated with your Account. Figure 99 defines the various status messages that may show on your In-Home Device List when you request to remove an In-Home Device.


HAN Device Status Descriptions – Remove a HAN Device	
Status	Status Description
<i>Remove Acknowledged</i>	A request to remove this In-Home Device was sent by you or your authorized Third-Party Service Electric Provider and received by SMT.
<i>Remove Pending</i>	The Remove Request has been sent by SMT and received by your electric utility company.
<i>Device Removed</i>	<p>The In-Home Device has been successfully removed and can no longer receive messages from your authorized Third-Party Service Provider.</p> <p> <b>NOTE:</b> Removing the In-Home Device from SMT does not physically remove the device from your property. It simply causes the communication link between your In-Home Device and your Smart Meter to be removed.</p>
<i>Remove Failed</i>	The request to remove an In-Home Device has failed. You may try to Remove the Device again.

Figure 99: In-Home Device Status Descriptions – Remove an In-Home Device

## 12.4 Viewing In-Home Device Details

The In-Home Device Details page provides more information about a particular In-Home Device.

SMT Procedure - Viewing HAN Device Details	
Step	Action
1	From the In-Home Devices List Screen, Select an In-Home Device
2	<p>Select the 'View Details' button</p> <p>A new screen will display, this screen shows additional information for your In-Home Device that is not displayed in the In-Home Devices List Screen:</p> <ul style="list-style-type: none"> <li>• In-Home Device MAC Address and Installation Code.</li> <li>• History of the In-Home Device: the times and dates of the status related to the Add request.</li> </ul>

Figure 100: Viewing In-Home Device Details

## 12.5 Viewing In-Home Device History

The In-Home Device History page provides more information about all the In-Home Devices that have been added or removed from a Smart Meter (ESI ID).

SMT Procedure - Viewing HAN Device History	
Step	Action
1	<p>From the In-Home Devices List Screen, Select 'In-Home Device History'</p> <p>A new screen will display; this screen presents a consolidated view of the Date-Time stamps for all the In-Home Devices that have been added to this Smart Meter (ESI ID) by you or by your authorized Third-Party Service Providers. This view also contains the history of In-Home Devices that have been removed from this ESI ID and the history of failed requests to add or remove In-Home Devices.</p>

Figure 101: Viewing In-Home Device History

### 13 Share Feedback

The SMT Team would love to hear about how you are using and how you are benefiting from using SMT. Your feedback could be selected to be published in [www.smartmetertexas.com](http://www.smartmetertexas.com) and in other marketing materials to promote the use of SMT.




**NOTE:** The feedback form should not be used if you need assistance from the SMT Team to solve any situation with your account. If you need help with using SMT, call the SMT Help Desk at 1-888-616-5859.

SMT Procedure – Sharing Your Feedback	
Step	Action
1	Navigate to the “Share Feedback” tab  The Feedback Form will display with your First Name and the Initial of your Last Name at the top of the page.
2	Enter your City
3	Select your State from the dropdown menu
4	Enter your Feedback (max. 1000 characters)
5	<i>Terms and Conditions (required)</i>  Check the box to confirm that you have read and agreed to the Terms and Conditions.
6	Click ‘Submit’ button

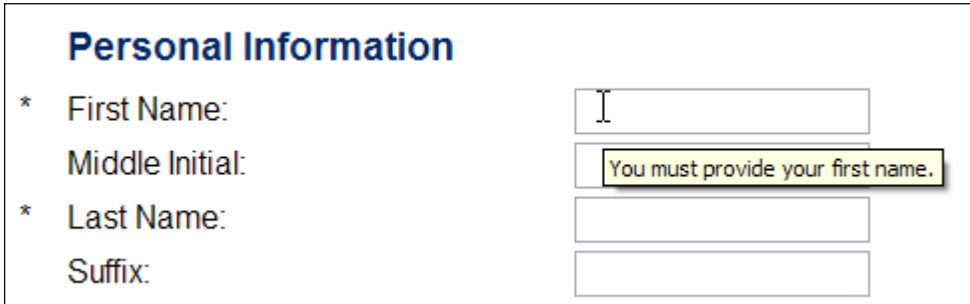
Figure 102: SMT Procedure – Sharing Your Feedback

## 14 Additional Help

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Most SMT web pages have page help available. Look for the Help icon  near the top of the page. Clicking this icon will display page help for the current page.

Most SMT fields and labels contain tool tips. Roll your mouse over the field or label to see the tool tip. Figure 103 shows an example of a displayed tool tip.



The screenshot shows a form titled "Personal Information" with four input fields: "First Name:", "Middle Initial:", "Last Name:", and "Suffix:". The "First Name" and "Last Name" fields are marked with an asterisk. A yellow tooltip box is overlaid on the "Middle Initial" field, containing the text "You must provide your first name." A cursor is visible in the "First Name" field.

Figure 103: Tool Tip Display

Frequently asked questions and other helpful information can be found by selecting the Help tab.

If you need help understanding your usage data, how it relates to your electricity bill, or how you can use this data to help you make changes in your consumption patterns, you should contact your Retail Electric Provider.

If you need additional Help with the SMT website, contact the SMT Team at **888-616-5859**.

## Appendix A: Working with CSV Files

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CSV, or Comma Separated Values, represents a specific text file format in which the fields in a record are separated by a comma.

### A.1 Creating a CSV File for Import

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Two of the most common tools for creating CSV files are Windows Notepad and MS-Excel.

Before creating your CSV file, you will need to know which fields to enter. If you will be using your Import file to add Smart Meters to your Account, you will need both ESI ID and Meter Number for each Smart Meter that you wish to add. If you will be using your Import file to create reports for your Smart Meters, then you will need either the ESI IDs or the Meter Numbers to be selected, but not both.

#### A.1.1 Creating a CSV File using Windows Notepad

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Open Windows Notepad on your computer.



**NOTE:** On most computers, Windows Notepad can be found by pressing the Start button, selecting 'All Programs', and then selecting 'Accessories'.

Type directly into the open text area. Use a comma to separate fields. Use the Enter key to separate rows. Each Smart Meter in your CSV file should be in a separate row. Do not include any headers, text, or other information in the file.

Figure 104, Figure 105, and Figure 106 show examples of CSV files created in Windows Notepad.

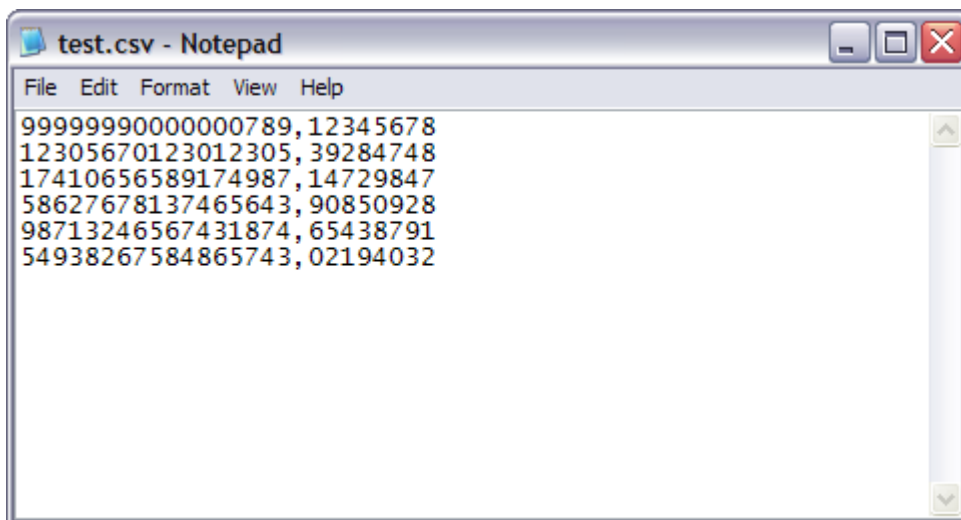


Figure 104: Sample Notepad CSV – Import for Adding Meters



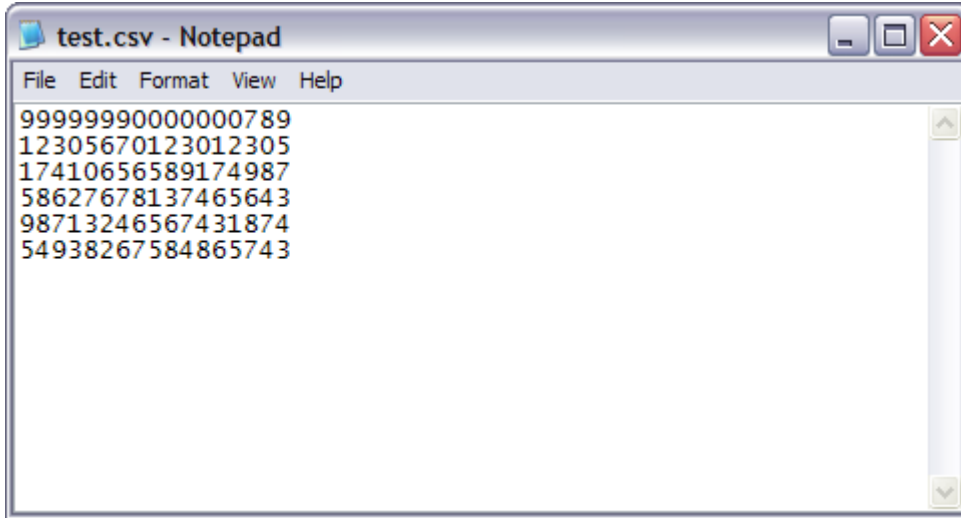


Figure 105: Sample Notepad CSV – Import for Reporting by ESI ID

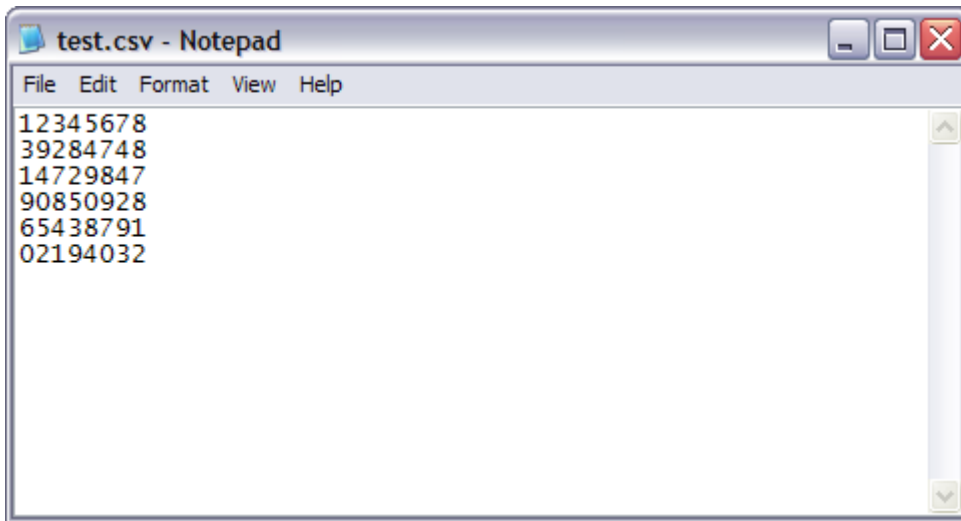


Figure 106: Sample Notepad CSV – Import for Reporting by Meter Number

Save your file and exit Windows Notepad when you are finished entering your data.



**NOTE:** Windows Notepad will automatically save your file with a file extension of TXT. SMT requires Import files to have a file extension of CSV. You must rename your file after saving with Windows Notepad so that it ends in CSV.

Test.txt must be renamed to Test.csv

### A.1.2 Creating a CSV File using MS-Excel

Open MS-Excel on your computer.

Each Smart Meter in your file should be in a separate row. Each field should be in a separate column. Do not include any headers, text, or other information in the file.



**NOTE:** Excel has a limitation of 15-digits for cells formatted as Number. Excel will use exponential notation for numbers greater than 12-digits for cells formatted as General. Because ESI IDs contain 17-digits, any Excel cell where you will type an ESI ID must first be formatted as 'Text'.

Figure 107, Figure 108, and Figure 109 show examples of MS-Excel files.

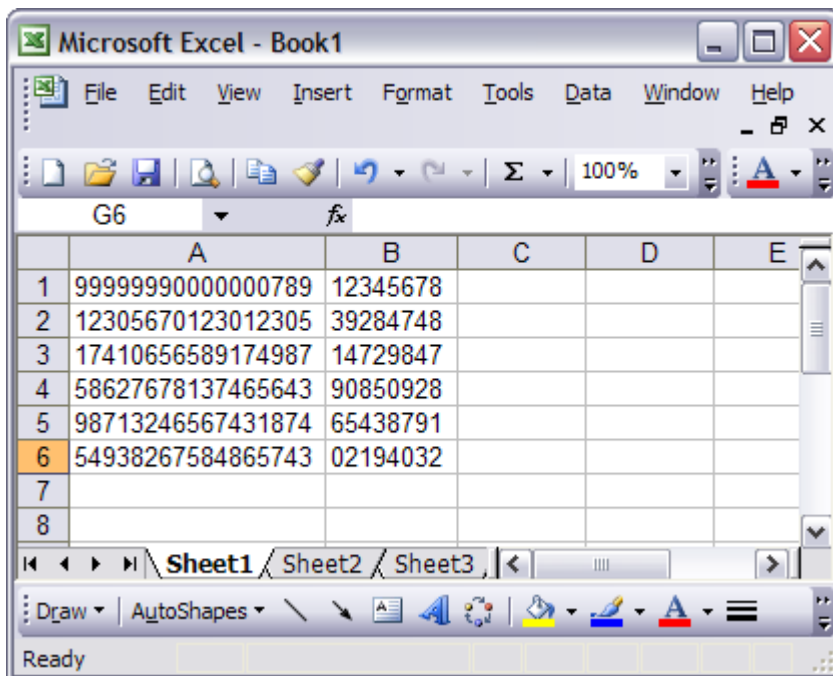


Figure 107: Sample Excel CSV – Import for Adding Meters

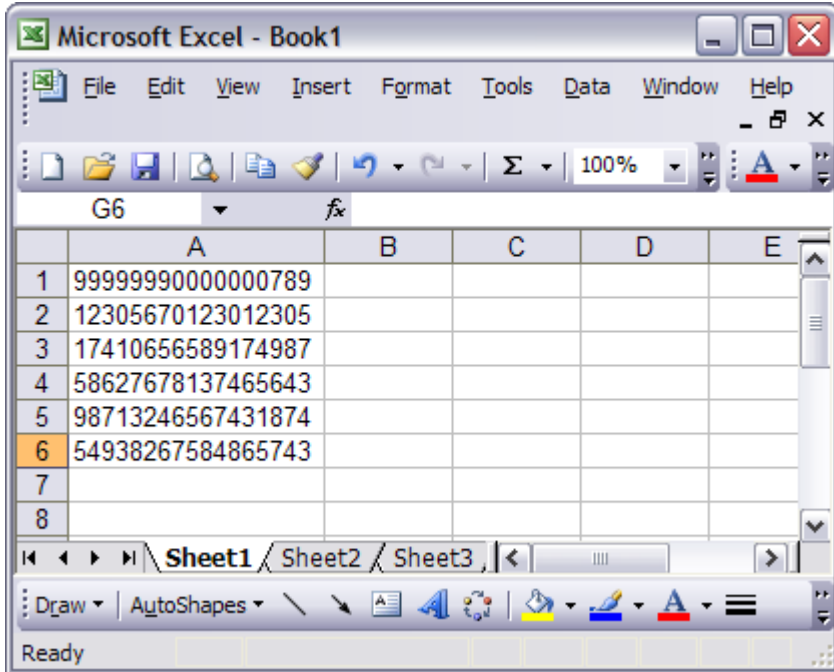


Figure 108: Sample Excel CSV – Import for Reporting by ESI ID

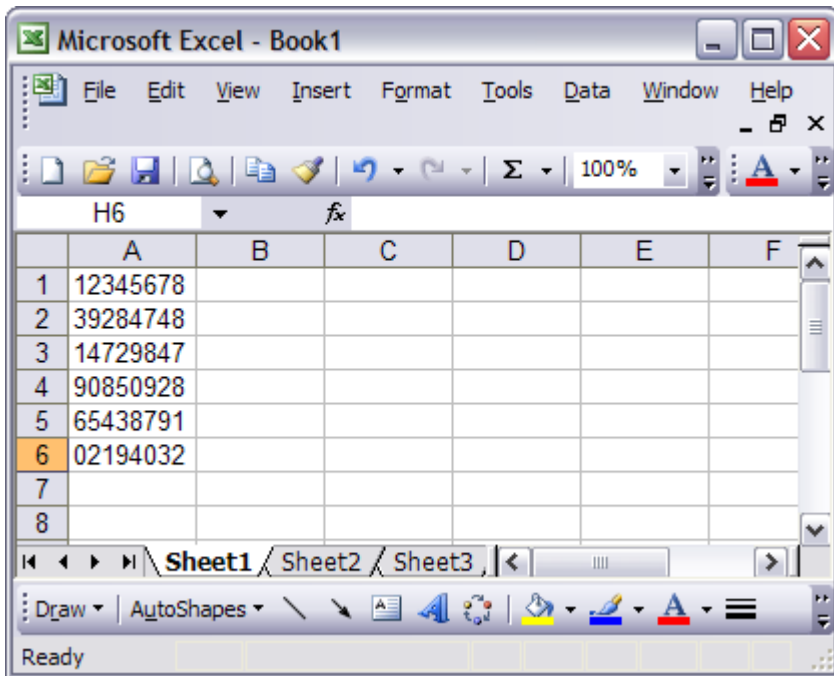


Figure 109: Sample Excel CSV – Import for Reporting by Meter Number

When you are finished entering your data, save your file as a CSV file by selecting the CSV in the ‘Save as type’ field as show in Figure 110.

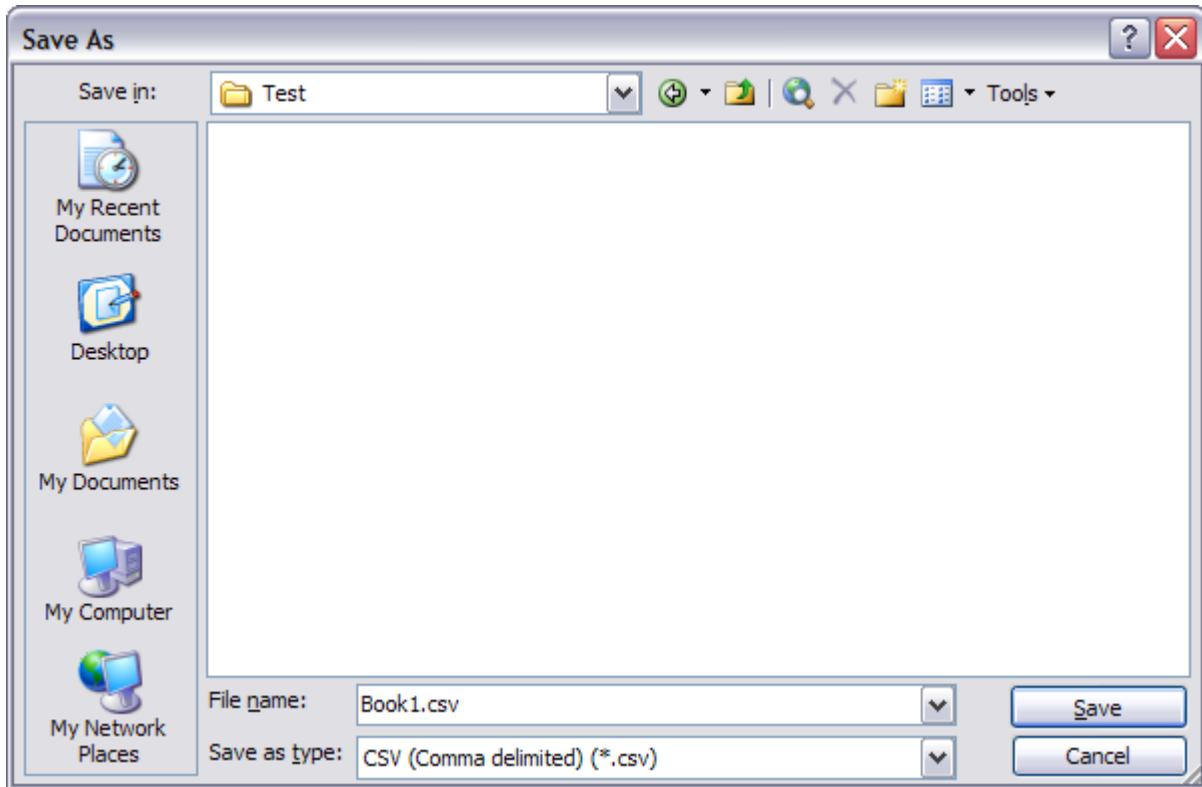


Figure 110: Excel Save as type CSV



**NOTE:** When Excel saves to the CSV file type, it does not save the cell format. If you re-open the file that you just created, Excel will default the cell formatting to the General format. For cells formatted as General, Excel will use exponential notation for numbers greater than 12-digits. Because ESI IDs contain 17-digits, your ESI IDs will not display correctly. For more information, see *Appendix A.2 Opening a CSV File*.

## A.2 Opening a CSV File

Reports and files that are exported or downloaded from SMT are in CSV format. Since CSV files are specially formatted text files, they can be opened by any text-based application, like Windows Notepad.

CSV files can also be opened by MS-Excel. However, Excel will default the cell formatting to the General format. For cells formatted as General, Excel will use exponential notation for numbers greater than 12-digits. Because ESI IDs contain 17-digits, your ESI IDs will not display correctly if you simply open the CSV file using Excel.

To properly display all fields, you must use the Excel 'Import External Data' feature which can be found under Data on your Excel toolbar, as show in Figure 111.

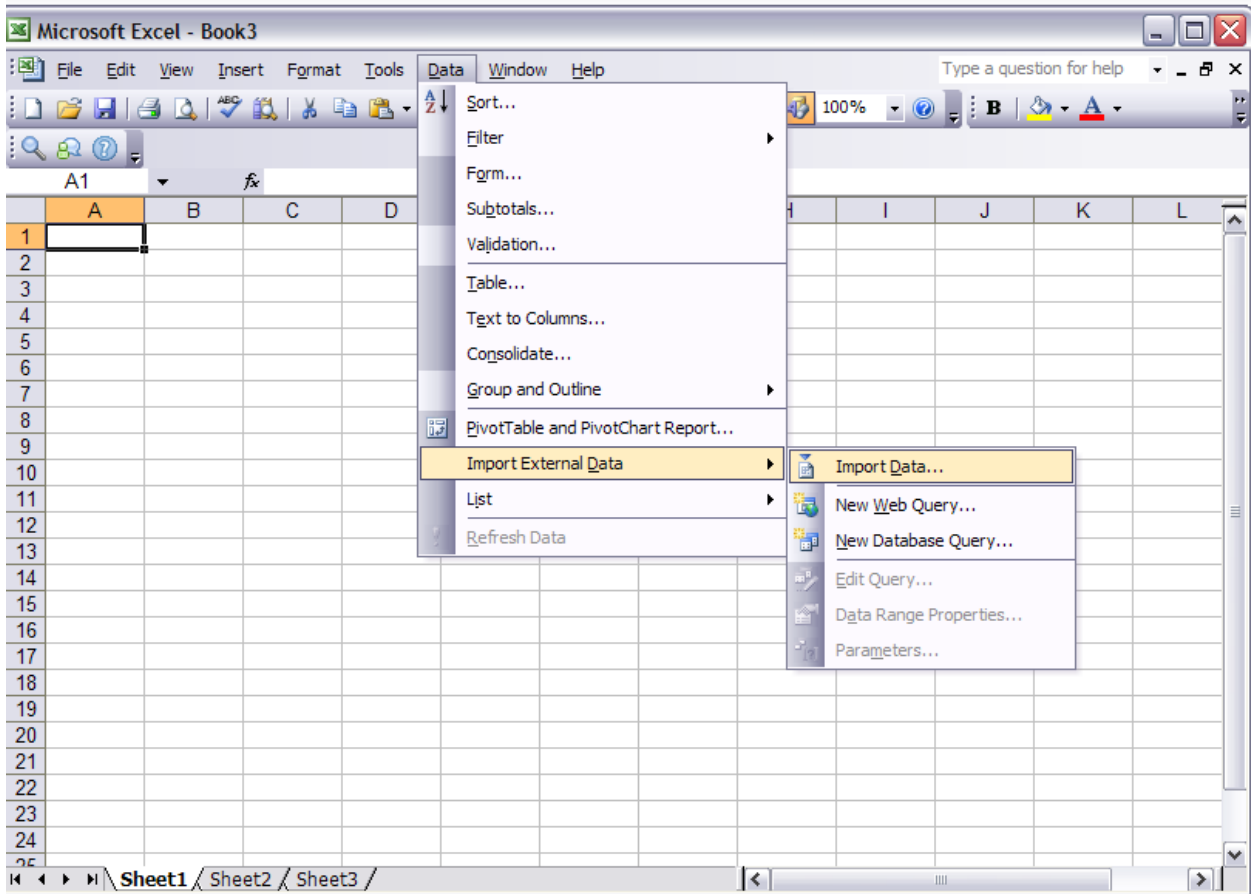


Figure 111: Excel Import External Data

Select the CSV file to be opened as your Source Data file. This action will initiate the Excel Text Import Wizard. In Step 1 of 3 of the Text Import Wizard, verify that 'Delimited' is selected, as shown in Figure 112, and Click Next.

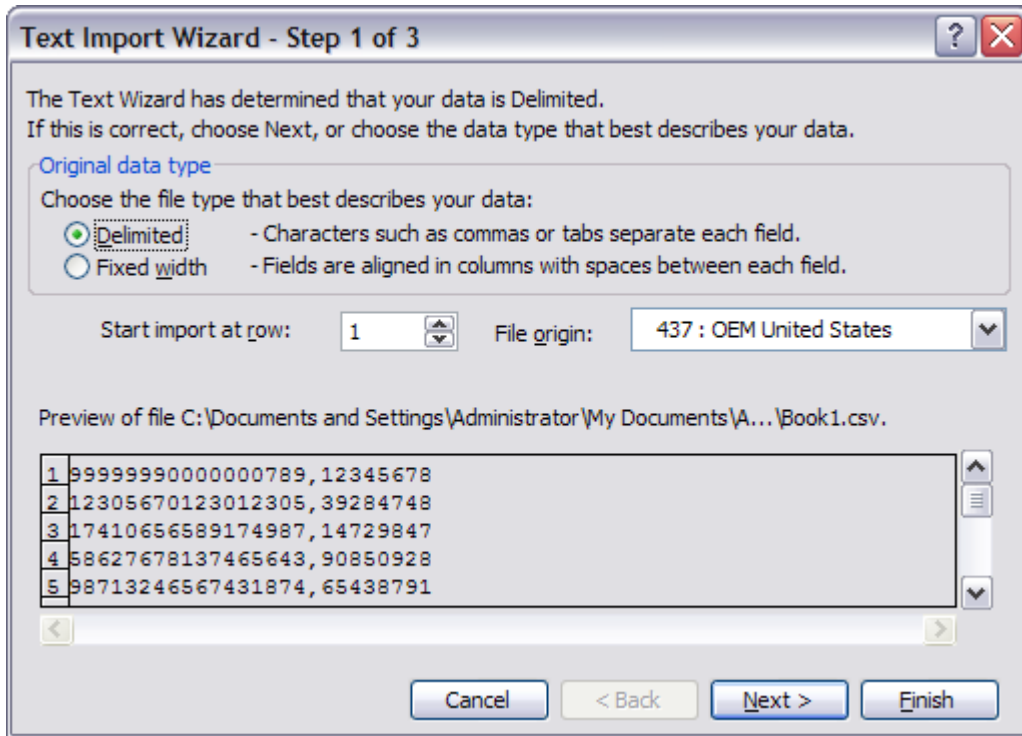


Figure 112: Excel Text Import Wizard – Step 1 of 3

In Step 2 of 3 of the Text Import Wizard, verify that 'Comma' is selected, as shown in Figure 113, and Click Next.

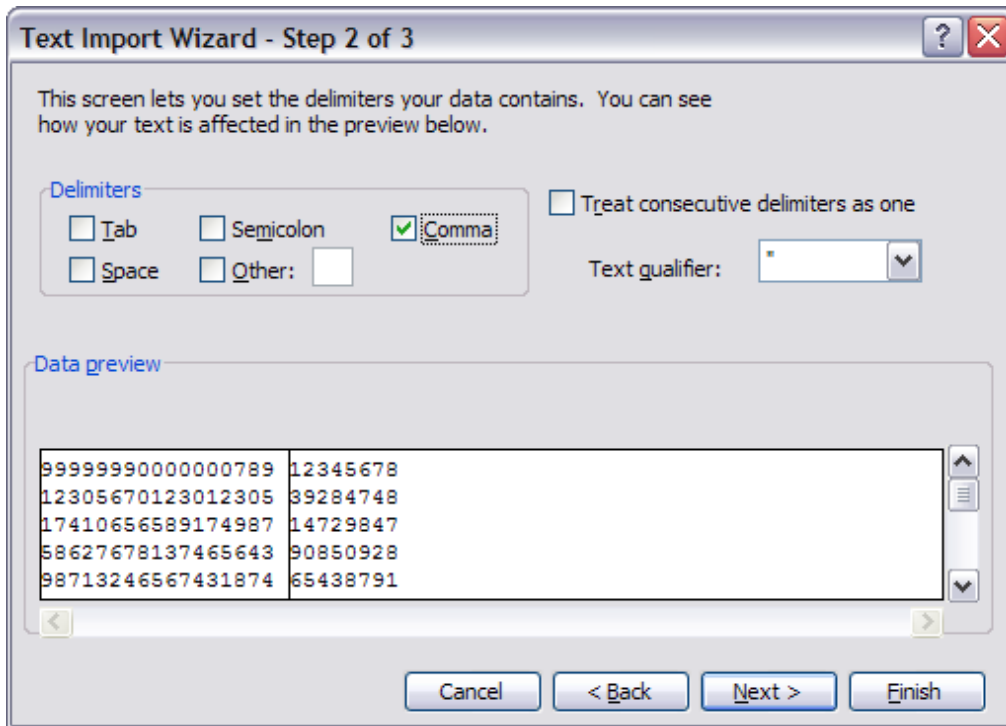


Figure 113: Excel Text Import Wizard – Step 2 of 3

In Step 3 of 3 of the Text Import Wizard, select the column header of any column containing ESI IDs, change the column data format to 'Text', as shown in Figure 114, and Click Finish.

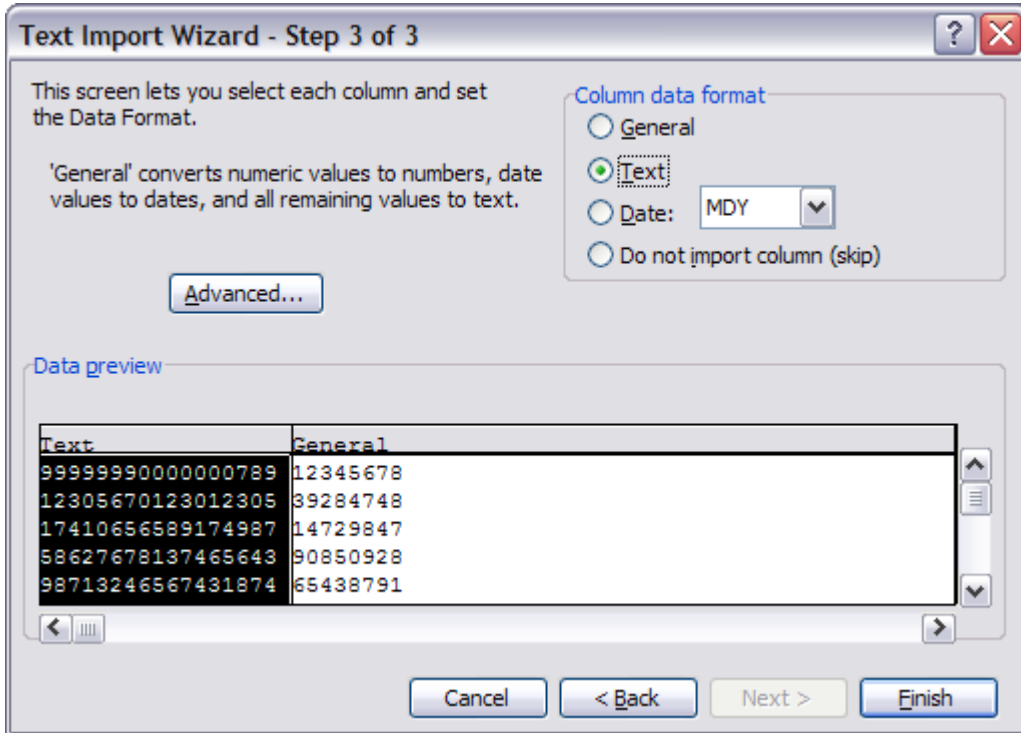


Figure 114: Excel Text Import Wizard – Step 3 of 3

## Appendix B: Working with XML Files

The Green Button functionality provides the consumers access to their energy usage information in a downloadable, nationally standardized format using XML, or Extensible Markup Language. XML is a markup language that defines a set of rules for encoding documents in a format that is both human-readable and machine-readable.

For more information on Green Button initiative and Energy Services Provider Interface (ESPI), refer to [http://www.naesb.org/ESPI\\_Standards.asp](http://www.naesb.org/ESPI_Standards.asp).

### B.1 Sample Interval Report in Green Button XML Format

The following is a sample interval report in Green Button XML format that consumers can receive via email upon completion of their request for 15 minute interval report.

```
<?xml version="1.0" encoding="UTF-8" ?>
- <feed xmlns="http://www.w3.org/2005/Atom">
  <id>[REDACTED]9430A97C904D0AC</id>
  <title>SMT Green Button Report: Interval</title>
  <updated>2012-02-01T10:36:04-08:00</updated>
- <entry>
  <id>[REDACTED]9430A97C904C002</id>
  <title>Electricity Delivered (KwH)</title>
  - <content>
    - <ReadingType xmlns="http://naesb.org/espi">
      <intervalLength>900</intervalLength>
      <powerOfTenMultiplier>3</powerOfTenMultiplier>
      <timeAttribute>2</timeAttribute>
    </ReadingType>
  </content>
  <updated>2012-02-01T10:36:04-08:00</updated>
</entry>
- <entry>
  <id>[REDACTED]9430A97C904C002</id>
  <title>Energy Delivered (WH)</title>
  - <content>
    - <UsagePoint xmlns="http://naesb.org/espi">
      - <ServiceCategory>
        <kind>0</kind>
      </ServiceCategory>
    </UsagePoint>
    - <IntervalBlock xmlns="http://naesb.org/espi">
      - <interval>
        <duration>86400</duration>
        <start>1328832000</start>
      </interval>
      - <IntervalReading>
        - <timePeriod>
          <duration>900</duration>
          <start>1328832900</start>
        </timePeriod>
        <ReadingQuality>1</ReadingQuality>
      </IntervalReading>
    </IntervalBlock>
  </content>
</entry>
```

Figure 115: Sample Green Button XML File



## B.2 Green Button XML Data Elements

The following is a list of the XML data elements found in the Green Button XML file, along with the description and sample values.

Element	Description	Values
ReadingType/intervalLength	Default interval length specified in seconds for Readings of ReadingType.	900
ReadingType/PowerOfTenMultiplierType	Code for the power of ten multiplier which, when used in combination with the uom, specifies the actual unit of measure for Readings of ReadingType. Valid values per the standard are defined in PowerOfTenMultiplierType.	3
ReadingType/TimeAttributeType	Code used to specify a particular type of time interval method for Readings of ReadingType. Valid values per the standard are defined in TimeAttributeType.	2
IntervalBlock	Time sequence of Readings of the same ReadingType.	
Interval	Specifies the time period during which the contained readings were taken.	
timePeriod	The date time and duration of a reading. If not specified, readings for each "intervalLength" in ReadingType are present.	
IntervalBlock/DateTimeInterval/duration	Duration of the interval, in seconds (Range)	86400
IntervalBlock/DateTimeInterval/start	Date and time that this interval started.	1314835200
IntervalBlock/IntervalReading/DateTimeInterval/duration	Duration of the interval, in seconds (increments)	86400
IntervalBlock/IntervalReading/DateTimeInterval/start	Date and time that this interval started (Interval start time + increments)	1314835200

## Appendix C: Glossary

The following terms and acronyms are commonly used by SMT or in the Texas competitive electric market.

Term	Definition
AMS	Advanced Metering Solutions
Authenticated user	Users who have already logged in with their UserID and password.
CSV	Comma Separated Values – a common file format in which the data is presented as a list of fields that are separated by commas. CSV files are typically opened with an application or spreadsheet software, such as MS-Excel.
Company Administrator	An employee or representative of a Company that is assigned the role and responsibility to manage (grant and revoke) permissions of Accounts having SMT access to the Smart Meters associated with the Company.
ERCOT	Electric Reliability Council of Texas that operates the electric grid and manages the deregulated market for 75 percent of the state of Texas.
ESI ID	Electric Service Identifier, a unique identifier for the point of electric delivery to a consumer.
FAQ	Frequently asked questions
HAN	Home Area Network – this is the network between the advanced meter and the home device as mentioned in the AMS rules
PUCT	Public Utility Commission of Texas
REP	Retail Electric Provider
ROR	REP of Record
SMT	Smart Meter Texas
TDSP	Transmission and Distribution Service Provider
Unauthenticated user	Users who have not yet logged in with their UserID and password.
XML	Extensible Markup Language - The Green Button capability will allow the Residential and Business customers to retrieve their detailed energy usage information from SMT's website in a standardized XML format