7.13.2 Interval Data Recorder Meter Installation Process

(1) Pursuant to Protocol Section 18.6.1, Interval Data Recorder Meter Mandatory Installation Requirements, this Section 7.13.2 details the steps that Market Participants shall follow when processing mandatory or optional IDR Meter installations.

7.13.2.1 Interval Data Recorder Meter Requirement Report

(1) The IDR Meter Requirement Report consists of the following criteria:

(a) Report Generation - The IDR Meter Requirement Report is generated on the second day of each month. In addition to the ESI IDs that are already on the IDR Meter Requirement Report, the ERCOT System identifies active and de-energized ESI IDs that meet the IDR Meter Mandatory Installation Requirements as defined in Protocol Section 18.6.1, Interval Data Recorder Meter Mandatory Installation Requirements, and are not assigned a BUSIDRRQ Load Profile Type.

(b) Posting of the Report - ESI IDs that meet the above criteria are placed on the IDR Meter Requirement Report, which is available on ERCOT’s Market Information System (MIS) to the respective CRs (Retail Electric Provider (REP) of record), TDSPs, and the Public Utility Commission of Texas (PUCT). Should an ESI ID listed on the report switch to a different CR, the ESI ID would show up on the gaining CR’s report, and will no longer appear on the report of the losing CR. Updated IDR Meter Requirement Reports are normally posted on the second day of each month.

(c) Resolution - ESI IDs listed on the IDR Meter Requirement Report ordinarily remain on the report until an IDR Meter is installed and the Load Profile Type has been changed to reflect the Load Profile Type of “BUSIDRRQ” and a Meter Data Type of “IDR.” The month and year of the IDR Meter installation will be shown in the “Month Resolved” column for the next three monthly reports, after which time the ESI ID will be dropped from the report. The “Month Resolved” column for each ESI ID will:

(i) Be blank if 120 days have not yet passed since the ESI ID first appeared on the report;

(ii) Show the month and year that the IDR Meter was installed and the Load Profile Type was changed (via TX SET transaction) to BUSIDRRQ; or

(iii) Show “Overdue” if 120 days have passed since the ESI ID first appeared on the report and the Load Profile Type has not been changed to BUSIDRRQ as a result of the required IDR Meter being installed.

(2) If an ESI ID was placed on the IDR Meter Requirement Report because of one or more errors (e.g., incorrect meter reads), the TDSP shall submit market transactions to correct the error(s) or contact the appropriate ERCOT Retail Account Manager to explain the situation and request that the ESI ID be manually removed from the IDR Meter Requirement Report. ERCOT shall take action to correct subsequent IDR Meter Requirement Reports following such notification

7.13.2.2 Mandatory Interval Data Recorder Installation Process

(1) Each month following ERCOT’s publishing of the IDR Requirement Report, the CR has 30 days to verify that each ESI ID meets the requirements of Protocol Section 18.6.1, Interval Data Recorder Meter Mandatory Installation Requirements, and if so, initiate the appropriate request to the TDSP or notify the TDSP of any discrepancies for investigation.

(a) If the IDR Meter installation request meets the Protocol requirements, the CR shall initiate a request to the TDSP for an IDR Meter to be installed using one of the following options:

(i) Send the appropriate 650\_01, Service Order Request, requesting an exchange of the current meter to an IDR Meter installation, also included in the TX SET transaction the CR will provide in the comments/text field the reason for the exchange request (example, ESI ID met mandatory install requirements) along with all CR and Customer contact information in order that the TDSP can appropriately coordinate and schedule the request with the CR and/or Customer.

(ii) Complete Section 9, Appendices, Appendix H2, Interval Data Recorder (IDR) Meter Installation Request Form, and submit it by e-mail to the appropriate TDSP for processing at the TDSP’s e-mail address listed in Table 29, TDSP E-mail Addresses for the IDR Installation Request Form, below.

**Table 29. TDSP E-mail Addresses for the IDR Installation Request Form**

| **TDSP** | **Contact Information for Emergency Reconnect** |
| --- | --- |
| **AEP** | [crrtx@aep.com](mailto:crrtx@aep.com) |
| **CNP** | [CR.Support@CenterPointEnergy.com](mailto:CR.Support@CenterPointEnergy.com) |
| **NEC** | eflores@nueceselectric.org or cduncan@nueceselectric.org |
| **Oncor** | [meteringservices@Oncor.com](mailto:meteringservices@Oncor.com) |
| **TNMP** | [MV90operator@tnmp.com](mailto:MV90operator@tnpe.com) |

(iii) Submit the request via TDSP’s website where available. Currently, Oncor is the only TDSP with this option.

(b) If an ESI ID appears on the report, but the CR determines that a Customer does not want to have an IDR Meter installed and meets the criteria specified in Protocol Section 18.6.2, Interval Data Recorder Meter Optional Removal, which would allow an IDR Meter to be removed, the CR shall contact the appropriate ERCOT Retail Account Manager and explain the reason why the CR will not be requesting an IDR Meter installation for the ESI ID. The CR shall also notify the TDSP of reason(s) that an IDR Meter installation will not be requested. Upon receipt of such notification the TDSP shall determine whether the reason(s) meet the requirements of Protocol Section 18.6.2. If the reason(s) do not meet the Protocol requirements, the TDSP shall notify the CR of its findings along with all supporting evidence. If the reason(s) do meet the Protocol requirements, the TDSP shall not install the IDR Meter.

(c) If after 120 days of the ESI ID appearing on the report the TDSP has not received Notification from the CR of either a dispute of an IDR Meter requirement or an ESI ID qualifying for optional removal as identified in the preceding paragraph, the TDSP shall proceed with the IDR Meter installation and shall provide Notification to the CR of the TDSP’s intent to perform the installation. Upon completing the installation, the TDSP shall provide market notification of the installation through normal market transactions.

(d) In agreement with the CR, and in collaboration with the Customer, the TDSP may install an IDR Meter for an ESI ID prior to expiration of the 120 days.

(e) Costs associated with mandatory installation of IDR Meters by TDSPs shall be the responsibility of the TDSP.

(2) If a CR determines that an ESI ID appears on the IDR Meter Requirement Report in error, the CR shall notify the TDSP for that ESI ID. If the TDSP agrees with the CR’s determination, the TDSP shall submit the appropriate TX SET transaction(s) to correct the error(s) as specified in Section 7.13.2.1, Interval Data Recorder Meter Requirement Report. If the CR and TDSP cannot come to an agreement concerning the IDR Meter requirement for an ESI ID, either party may use the MarkeTrak process, if appropriate, to resolve any disputes. If a MarkeTrak resolution is not possible for a dispute, either party may request an ADR in accordance with Protocol Section 20, Alternative Dispute Resolution Procedure.

(3) TDSP processing of mandatory IDR Meter installations is as follows:

(a) Within ten Retail Business Days of receipt of the Section 9, Appendices, Appendix H2, the TDSP shall:

(i) Complete the appropriate sections of the request form indicating TDSP Contact Name and Phone Number, Contact E-mail Address, along with estimated date of IDR Meter installation; and

(ii) Return the completed request form by e-mail to the originating CR.

(A) The IDR Meter installation must be completed no later than the Customer's second billing cycle after the date the completed installation request was received by the TDSP.

(B) The TDSP shall send the appropriate TX SET transaction to change the Load Profile Type code and the Meter Data Type code of the Load Profile Type as directed by the Load Profiling Guide along with all applicable meter data.

7.13.2.3 Optional Interval Data Recorder Installation Request Process

(1) Upon a retail Customer’s request to a CR for installation of an IDR Meter at a Premise, the CR shall verify that the IDR Meter installation would be consistent with Protocol Section 18.6.1, Interval Data Recorder Meter Mandatory Installation Requirements. If so, the CR shall then request the TDSP to initiate the installation, per paragraph (a) of Section 7.13.2.2, Mandatory Interval Data Recorder Installation Process.

(2) Once the TDSP receives the optional IDR Meter installation request from the CR, the TDSP shall verify that the request satisfies the requirements of Protocol Section 18.6.1. If the request does not meet the Protocol requirements, the TDSP shall notify the CR of its findings along with all supporting evidence. If the request meets the Protocol requirements, the TDSP shall install the IDR Meter no later than the Customer's second billing cycle following receipt of a valid request.

(3) The TDSP shall then submit the appropriate TX SET transaction to change the Load Profile Type code and the Meter Data Type code of the Load Profile Type as directed by the Load Profiling Guide, along with all applicable meter data.

(a) If a Customer contacts the TDSP directly to make an optional request for the installation of an IDR Meter, the TDSP shall refer the Customer to its CR to initiate the request, regardless of the option a CR has chosen for service order request.

(b) IDR Meter optional installations are subject to applicable TDSP tariff charges. Consult each TDSP’s tariff for complete details.

7.13.2.4 Interval Data Recorder Installation Request Form

(1) If a CR chooses to make its request to the TDSP by sending Section 9, Appendices, Appendix H2, Interval Data Recorder (IDR) Meter Installation Request Form, the CR must complete all relevant sections of the request form including:

(a) CR Name and CR DUNS, CR Contact Name & Telephone Number, CR Contact E-mail Address, Date Request sent from CR to TDSP, and TDSP Name.

(b) In addition, for each applicable ESI ID, the form must include:

(i) Customer Name, Customer Primary and Alternate Area Code and Telephone number(s), Special Instructions or Arrangements Required by Customer to assist TDSP with coordinating and scheduling installation;

(ii) The associated Service Address; and

(iii) The actual peak Demand for the most recent 12 months.

(2) An incomplete request form may be rejected by the TDSP, whereupon the CR shall add the missing information and resubmit the request form reflecting the date that the request is being resubmitted to the TDSP.