**AMS/IDR Solution**

**Primary goal:** transition current IDR Metered interval data to initial settlement post Operating Day

**Secondary goals**:

1. Maintain a 4CP indicator for ERCOT and market participants
2. Ensure expected data stream is identifiable – LSE vs 867 w/interval data
3. Preserve historical data accessibility for previous BUSIDRRQ profiled ESIs
4. Identify a transition plan for converting IDR Metered and/or BUSIDRRQ ESIs to AMS metered profiles

**INDICATOR**

The below options were considered for maintaining a 4CP indicator for ERCOT and market participants.

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|  | INDICATOR FOR 4CP | Description | Pros/Cons |
| 1 | Use existing BUS profile with unique ‘NWS’ (non- weather sensitive) segment | * This segment was once an acceptable combination. * ~7-8 years ago an effort to streamline the # of profiles removed this combination * ERCOT systems, and possibly market participant systems may still be able to recognize this combination * Could create new data stream | * **PRO**: Seems to be the easiest to implement * **PRO**: Easily drives the data stream * **CON**: not an obvious indicator |
| 2 | Creating New Profiles | * Creating a new unique BUSLRG profile to replace BUSIDR for those customers transitioning > 700 kW/kVA yet utilize and AMS meter with daily settlement * Could create new data stream | * **PRO**: Clear indicator of 4CP with AMS * **PRO**: Easily drives the data stream * **CON**: long lead time and high cost to implement |
| 3 | Transactional segment for AMS Meter | * Additional segment on 814\_04/814\_05 to indicate 4CP or NCP for AMS meters * Maintain existing BUS profile | * **PRO**: Clear indicator of 4CP with AMS * **CON**: higher cost with longer lead time as would likely need to be associated with TXSET 5.0 |
| 4 | Modification of Premise Type | * Threshold for Large Residential premise type classification could be revised from 1000 kW down to 700 kW to align with protocols * Maintain existing BUS profile | * **CON**: largest hurdle is modifying PUC POLR rule which has the current threshold at 1 MW * **CON**: would have impacts on POLR distribution |
| 5 | Use of Rate Code | * TDSPs have different rate codes for AMS meters subject to 4CP vs NCP * Monitoring of 814\_20s to determine if ESI is subject to 4CP * Maintain existing BUS profile | * **PRO:** clear indicator of 4CP with AMS * **CON:** ERCOT/market participants would have to maintain all TDSP rate codes and revise queries |

The goal of the indicator would be to replace the manual process, below. Currently, with the deployment of NPRR 877, customers who are 4CP billed have the option to retain the Business AMS profile (BUSHI/BUSMED/BUSLO) in lieu of the BUSIDRRQ profile, allowing for earlier settlement. If elected, the TDSP sends a MarkeTrak to ERCOT, so ERCOT can flag the ESIID in their systems to exclude it from the IDR Requirement report and AMS threshold check.  Once the indicator is in place, a manual process will not be required and ERCOT will use the indicator to exclude as necessary.

Other considerations for the indicator:

* If considering new profiles or NWS segment, an additional 72 profiles would be created including DG profiles. Another benefit is that ERCOT would now be able to consider negative load treatment in settlement. (NOTE: RIDs do not have a DG profile)

**DATA STREAM**

Each TDSP will provide a daily LSE file for any ESIIDs transitioned from IDR to AMS. At this time, only AEP will provide the 867IDR interval transaction in addition to the LSE file (see below). Market Participants should understand the different output files and formats, unique to each TDSP, and determine which data stream to use to fit their business needs. In addition, the indicator chosen to be implemented by MPs will help users identify any Business ESIID that have been converted from the 867IDR interval data stream to the daily LSE data stream.

AEP proposed a **‘bolt on’ solution** whereby specified ESIs will receive both the daily LSE files and the monthly 867 w/ interval data. ERCOT will pass along the monthly 867 w/ interval data to the REP of Record (ROR), but will fail loading the transaction into the ERCOT settlement system (LodeStar).

* ERCOT and participating REPs supporting this option. For REPs, this supported utilizing current data accessibility for BUSIDRRQ profiled ESIs.
* Oncor is unable to support this solution as they plan to transition away from the MV-90 system which currently produces the monthly interval data for BUSIDRRQ ESIs. They prefer to transition to daily LSE files.
* TNMP believed they could support the ‘bolt on’ solution, but would need to confirm.
* CNP is checking internally if they would be able to provide both an LSE and 867, but due to resources constraints any discussions concerning this subject cannot occur until after the backlog of exceptions identified post CIS Conversion have been resolved.

**HISTORICAL DATA ACCESSIBILITY**

REPs (and brokers) are concerned with changing the current process for data accessibility for these larger commercial and industrial customers. Today, the REP/broker secures a Letter of Authorization (LOA) and are able to access interval data via TDSP’s portals.

Two suggestions were proposed to ensure data access for these large non-residential customers with BUS profiles (other than BUSIDRRQ):

1. Maintain existing LOA process whereby interval level data is provided via TDSP portal
2. For LOA requests, TDSP would return meter number with ESI monthly historical data

Option #2 would require TDSP Regulatory review if current LOA form is revised. It is understood the format may need to change if TDSPs provide LSE file level data.

**TRANSITION PLAN**

Below are the considerations in identifying a transition plan of the existing ~13,000 BUSIDRRQ profiled ESIs. (It is understood some ESIs will not be transitioned. See answers from IDR/AMS Meter Matrix).

* TDSP Conversion time line:
  + Oncor and TNMP are nearly fully deployed where most BUSIDRRQ customers currently have an AMS meter asset
  + AEP’s plans are underway
  + CNP is replacing existing IDR Meters with AMS IDR capable meters which essentially allows for remote reading capability.
* Customer awareness of meter asset replacement??
* Oncor announced their “new standard” for those customers who exceed the 700 kW threshold, will be to maintain the existing BUS profile and forward a Marketrak to ERCOT for placement of the ESI on the exception table. Customer notification does not occur. REPs will receive an 814\_20 notifying of a 4CP applicable rate code. AEP expressed they will employ the same standard as customers meet the threshold.
* TDSPs questioned the need for the 45 day notice for those customers moving from BUSIDDRQ to a BUS profile. Is this needed any longer?
* If a customer moves from BUSIDRRQ to a BUS profile, which profile will the ESI initially be placed on? BUSNODEM until the 10 kW/5 kW is reached? Or the respective BUS HI/MED/LO based on actual historical consumption available?