**As of 8/21/20**

**AMS/IDR Solution**

**Primary goal:** Improve accuracy of ERCOT initial settlement (actual vs estimated) by transitioning current IDR metered premises, where possible, to AMS profiled premises which allows for provision of post Operating Day interval data

**Requirements**:

1. Maintain a 4CP **INDICATOR** for ERCOT and market participants
2. Ensure expected **DATA STREAM** is identifiable – LSE vs 867 w/interval data
3. Consider **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.

[Space reserved for ERCOT to provide verbiage on reasons/needs for a 4CP indicator eg Forecasting/Analysis, etc]

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.

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|  | INDICATOR FOR 4CP | Description | Pros/Cons |
| 1 | Reactivate BUS profile with unique ‘NWS’ (non- weather sensitive) segment combination | * 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**: Potentially less costly than option 2 * **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 4CP | * Additional segment on 814\_04/814\_05 to indicate 4CP or NCP for AMS meters * Maintain existing BUS profile * For REP of Record only | * **PRO**: Clear indicator of 4CP with AMS * **PRO**: ERCOT can leverage indicator for future purposes * **CON**: potentially higher cost with longer lead time as would likely need to be associated with TXSET 5.0 * **CON**: doesn’t necessarily drive data stream |
| 4 | Modification of Premise Type | * Threshold for Large Non Residential premise type classification could be revised from 1000 kW down to 700 kW to align with protocols * Maintain existing BUS profile | * **PRO**: minimal impact to other MPs besides ERCOT * **CON**: largest hurdle is modifying PUC POLR rule which has the current threshold at 1 MW * **CON**: would have impacts on POLR distribution for ERCOT processes |
| 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 |

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**

As default, Each TDSP will provide a daily LSE file for any ESIIDs transitioned from IDR to AMS.T

Alternatively, at this time, only AEP will provide the 867IDR interval transaction in addition to the LSE file whereby specified ESIs will receive both the daily LSE files and the monthly 867 w/ interval data.

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.

**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 Meter Asset Conversion timeline:
  + 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.
* 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 BUSIDRRQ to a BUS profile. Is this needed any longer? Proposed NPRR may possibly change this.
* 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?