10/6/20 IDR/AMI Workshop II: <http://www.ercot.com/calendar/2020/10/6/211898>

\*\* see key documents\*\*

Agenda:

* + 1. Antitrust
		2. Introductions
		3. Background/History and work completed & Implementation Date (Feb 2022) [Sheri] – use “Goals of IDR AMS Solution” as baseline. <http://www.ercot.com/content/wcm/key_documents_lists/211899/Goals_of_AMS_IDR_Solution.docx>
	+ Revise “Indicator” section to include “ERCOT BUSIDRRQ to AMS Proposal” for <http://www.ercot.com/content/wcm/key_documents_lists/211899/ERCOT_BUSIDRRQ_to_AMS_Proposal.docx>
		1. Revision Requests approved to date:
		- LPGRR068, Add BUSLRG & BUSLRGDG profiles
		- RMGRR164, Related to NPRR1062, Modify IDR Meter Requirement and Eliminate IDR Meter Requirement Report
		- NPRR1062, Modify IDR Meter Requirement and Eliminate IDR Meter Requirement Report
	+ Introduce “Data Accessibility” and “TDSP Transition Plan” (segue into #4)
1. TDSP metering status update [Sam/Jim/TDSPs]
* Type of IDR meters not applicable for transition (TDSP note)
* Current # of IDR not applicable for transition (TDSP Note)
	+ Can TDSPs provide list of transitioning ESIIDs by DUNS to REPs on request? (REP Question)
* Provide Randy Roberts with ESIID list of BUSIDRRQ meters NOT TRANSITIONING (TDSPs due on Sept 1st)
* Randy to provide aggregated MW load of BUSIDRRQ not transitioning (RECTF)

\*\*Add below graphics to powerpoint presentation\*\*

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|  | **Oncor** | **CNP** | **AEP** | **TNMP** |   |
| Current number of BUSIDRRQ profiles in ERCOT (2/4/20) | 7,058 | 4,611 | 1,300 | 372 |   |
| Approximate # of ESIs eligible to be transitioned to BUSLRG profile  | 6900 ESIs\* in process of transitioning to BUS profile via MTs | None immediately; however may transition in future | 700 ESIs  | 292 ESIs |   |
| “EXCEPTIONS” | Example situations where a traditional IDR Meter will remain as the metering asset for premises >700kW/kVA: | Subtractive and EPS meters probably not until 2021; ESIs with RIDs | 4CP Billing; Transmission level, EPS and those with Direct Dedicated Telephone connections; add/subtractive meters | Transmission level; EPS meters; ESIs with RIDs; add/subtractive meters | EPS; Customer Owned Transformer Sites, Billing on Secondary Side of Transformer Sites |
| Approximate # of ESIs to remain on BUSIDRRQ | < 100 IDR Meters, 60 EPS | 4611 | 600 transmission level  | 65 Non-AMS 15 EPS |   |
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NOTE FROM REP QUESTIONS TO ADD TO PRESENTATION:

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| 5 | Are pulse outputs available with AMS meters? | Yes | Yes | Yes | No; Pulses require IDR |

1. TDSP Transition Plan

**BEFORE Feb 2022**: (For Oncor & AEP (AEP upon customer request))

* As existing IDR physical meters have been replaced with AMSM meters, has AEP confirmed the profile has remained as BUSIDRRQ?  And only new installations (new meter sets), the profiles have been set to an AMS (BUSHI/MED/LO) profile? (answer this question via #14 on matrix)
* For the TDSPs transitioning BUSIDRRQ ESIs prior to Feb 2022 and placing on an AMS profile, will historical interval data be available in CRIP sites via the LOA process?  (answer via #15)
	+ If not, when will interval data be available via CRIP sites?
	+ When historical interval data is made available via CRIP, will the data loaded be on a go-forward basis, or will TDSPs backfill historical interval data to when an AMS profile change occurred? (Check with Misty)

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| 14 | Transition Plan to move existing eligible BUSHI/MED/LO/IDRRQ to BUSLRG profile once available | Oncor plans to transition all applicable BUSIDRRQ to a respective BUSHI/MED/LO profile during 2021.Once BUSLRG is available all respective ESIs will transition to BUSLRG within 1-2 meter cycles on cycle date. | Not applicable at this time due to billing determinant requirements | Prior to BUSLRG availability, AEP will transition BUSIDRRQ to applicable BUSHI/MED/LO load profile based on the LPG Profile Decision Tree.Once BUSLRG is available all respective ESIs will transition to BUSLRG within 1-2 meter cycles on the cycle date.   | TNMP does not plan to transition to BUSHI/MED/LO profiles and will transition from BUSIDRRQ to BUSLRG within 1-2 meter cycles on cycle date. |

**Feb 2022**:

* Please provide operational details of the transition of load profiles once BUSLRG/DG profiles become available.
	+ Generally speaking, when will the 814\_20s be sent to the market?
	+ When will the ROR expect to receive ‘backfilled’ LSE files from the effective date of the profile change to the date the change was submitted?
	+ How will the TDSP ensure the transition day’s consumption is not ‘double counted’ – once on the old BUSIDRRQ cycle and again on the new BUSLRG cycle as the dates on the 867\_03s are typically different:
		- End cycle date overlap with begin cycle date for BUSIDRRQ
		- Next day cycle begin from previous end cycle date for AMS profiles
1. Data Availability, Accessibility, Timing, Formatting – (ROR, non-ROR, 3rd parties)

**AFTER Feb 2022**:

* Will power factor information be available for 4CP intervals once an ESI transitions to BUSLRG/DG? Chris is set up a meeting with Sherburn
* Do the TDSPs have any plans of providing interval level power factor information? No plan to provide at this time
* Does CNP have any plans to transition their systems to accommodate 4CP customers on an AMS profile?  If so, is a general timeline available?
* For all TDSPs, will the interval data format available on CRIP portals via LOA have the same format as the “old” BUSIDRRQ interval data format?  If not, please provide template. Plans for data to be the same as today (Misty)
* What is the specific timing for making BUSLRG profiled ESI interval data available on respective CRIP portals? By end of 2021
	+ Will all historical interval data (continuous) be available via CRIP portals once the transition to BUSLRG is performed?  Will there be any gaps in data? Misty
* Does AEP still have plans to send both an 867\_03 interval data format *and* daily LSE files for the BUSLRG/DG profiled ESIs?  Will those 867\_03s (w/interval data) continue to pass through ERCOT with the BUSLRG profile to be forwarded to the REP of Record or will they be rejected?   Has ERCOT confirmed?

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| 15 | ACCESS TO INTERVAL DATAREP of Record/Non-REP of Record/3rd parties–registered brokers/aggregators | Internal project to allow all parties access to BUSLRG profiled ESIs interval data via CRIPFor non-ROR, LOA is required for authorization to download data (CRIP)3rd parties: via ABC portal w/ LOA processOncor project is planned for an EOY (2021) implementation | Existing process will continue:  email requests to Usage.Req@centerpointenergy.comLOA remains a requirement for authorization to access data for non-ROR requests | For Non-ROR & 3rd Parties: IDR interval data is available via AEP Usage Hub (Non-Residential Historical Usage Portal) utilizing electronic LOA request method.For ROR: IDR interval data is available via 867\_03IDR transaction and AEP Usage Hub.  | For Non-ROR & 3rd Parties, interval data will be available through TNMP portal utilizing electronic LOA method.For ROR, interval data will be made available through TNMP portal and 867\_03 transaction.Regardless of meter type (AMS or IDR), interval data will be provided via PortalLOA remains a requirement for authorization to access data for non-ROR requests |

1. Market Participant Readiness (aka Testing -- ERCOT, SMT, TDSPs, REPs)
2. Q&A
3. Adjourn

REP Questions from Sheri:

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* For the TDSPs transitioning BUSIDRRQ ESIs prior to Feb 2022 and placing on an AMS profile, will historical interval data be available in CRIP sites via the LOA process?  (answer via #15)
	+ If not, when will interval data be available via CRIP sites?
	+ When historical interval data is made available via CRIP, will the data loaded be on a go-forward basis, or will TDSPs backfill historical interval data to when an AMS profile change occurred?
* Market testing of new BUSLRG & BUSLRGDG profiles – TDSP  ERCOT CR (newly added)

**Feb 2022**:

* ERCOT Data Loading Process – Kelly Brink to help take us through this?
* Please provide operational details of the transition of load profiles once BUSLRG/DG profiles become available.
	+ Generally speaking, when will the 814\_20s be sent to the market? (dependent on data loading timing)
	+ When will the ROR expect to receive ‘backfilled’ LSE files from the effective date of the profile change to the date the change was submitted? (data loading timing requirements)
	+ How will the TDSP ensure the transition day’s consumption is not ‘double counted’ – once on the old BUSIDRRQ cycle and again on the new BUSLRG cycle as the dates on the 867\_03s are typically different:
		- End cycle date overlap with begin cycle date for BUSIDRRQ
		- Next day cycle begin from previous end cycle date for AMS profiles

**AFTER Feb 2022**:

* Will power factor information be available for 4CP intervals once an ESI transitions to BUSLRG/DG?
* Do the TDSPs have any plans of providing interval level power factor information?
* Does CNP have any plans to transition their systems to accommodate 4CP customers on an AMS profile?  If so, is a general timeline available?
* For all TDSPs, will the interval data format available on CRIP portals via LOA have the same format as the “old” BUSIDRRQ interval data format?  If not, please provide template.
* What is the specific timing for making BUSLRG profiled ESI interval data available on respective CRIP portals?
	+ Will all historical interval data (continuous) be available via CRIP portals once the transition to BUSLRG is performed?  Will there be any gaps in data?
* Does AEP still have plans to send both an 867\_03 interval data format *and* daily LSE files for the BUSLRG/DG profiled ESIs?  Will those 867\_03s (w/interval data) continue to pass through ERCOT with the BUSLRG profile to be forwarded to the REP of Record or will they be rejected?   Has ERCOT confirmed?