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| **SMOGRR Number** | [**032**](https://www.ercot.com/mktrules/issues/SMOGRR032) | **SMOGRR**  **Title** | **Move OBD to Section 12 – TDSP Access to EPS Metering Facility Notification Form** |
| **Date Posted** | | March 20, 2025 | |
|  | |  | |
| **Requested Resolution** | | Normal | |
| **Settlement Metering Operating Guide Sections Requiring Revision** | | Section 11 Appendix B, On Site Work to EPS Metering Facilities  Section 12 Attachment C, TDSP Access to EPS Metering Facility Notification Form (new) | |
| **Related Documents Requiring Revision/Related Revision Requests** | | TDSP Access to EPS Metering Facility Notification Form (Upon approval of this Settlement Metering Operating Guide Revision Request (SMOGRR), this will be removed from the Other Binding Documents List.) | |
| **Revision Description** | | This SMOGRR incorporates the Other Binding Document “TDSP Access to EPS Metering Facility Notification Form” into the Settlement Metering Operating Guide to standardize the approval process. | |
| **Reason for Revision** | | [Strategic Plan](https://www.ercot.com/files/docs/2023/08/25/ERCOT-Strategic-Plan-2024-2028.pdf) Objective 1 – Be an industry leader for grid reliability and resilience  [Strategic Plan](https://www.ercot.com/files/docs/2023/08/25/ERCOT-Strategic-Plan-2024-2028.pdf) Objective 2 - Enhance the ERCOT region’s economic competitiveness with respect to trends in wholesale power rates and retail electricity prices to consumers  [Strategic Plan](https://www.ercot.com/files/docs/2023/08/25/ERCOT-Strategic-Plan-2024-2028.pdf) Objective 3 - Advance ERCOT, Inc. as an independent leading industry expert and an employer of choice by fostering innovation, investing in our people, and emphasizing the importance of our mission  General system and/or process improvement(s)  Regulatory requirements  ERCOT Board/PUCT Directive  *(please select ONLY ONE – if more than one apply, please select the ONE that is most relevant)* | |
| **Justification of Reason for Revision and Market Impacts** | | This SMOGRR is published for transparency and to standardize the approval process for all binding language. | |

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| **Market Segment** | Not Applicable |

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| **Market Rules Notes** |

To improve transparency, existing Other Binding Document language for new Section 12, Attachment C, is represented as blackline, with only proposed changes marked as redline.

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| **Proposed Protocol Language Revision** |

**ERCOT Settlement Metering Operating Guide**

Section 11

Appendix B

On Site Work to EPS Metering Facilities

Settlement Metering Process - 020

March 1, 2021

Appendix B

On Site Work to EPS Metering Facilities

Settlement Metering Process – 020

**Notification of Required Access to EPS Metering Facilities**

* For maintenance or changes to ERCOT-Polled Settlement (EPS) Metering Facilities, the Transmission and/or Distribution Service Provider (TDSP) shall notify ERCOT when access is expected to occur by completing Section 12, Attachment C, TDSP Access to EPS Metering Facility Notification Form, and e-mailing the completed form to “mreads@ercot.com”:
  + The e-mail subject line shall read “EPS Access Required – SITE NAME.”
* For maintenance or changes to equipment used in the calculation of the auxiliary Load telemetry provided to an EPS Meter, the Resource Entity shall notify ERCOT and the TDSP when access is expected to occur by completing the “Resource Entity Access to Auxiliary Load Telemetry System Notification Form” and e-mailing the completed form to [mreads@ercot.com](mailto:mreads@ercot.com) and an email contact provided to the Resource Entity by the TDSP:
  + The e-mail subject line shall read “Telemetry Access required – SITE NAME”
* For “emergency repairs,” the TDSP can notify ERCOT of the need to access EPS Metering Facilities by calling the Meter Data Acquisition System (MDAS) Operations Center at 512-248-6500 and submit Section 12, Attachment C, by the end of the next Business Day following such access.
* For “emergency repairs” of equipment used in the calculation of the auxiliary Load telemetry provided to an EPS Meter, the Resource Entity can notify ERCOT of the need to access EPS Metering Facilities by calling the Meter Data Acquisition System (MDAS) Operations Center at 512-248-6500 and submit the “Resource Entity Access to Auxiliary Load Telemetry System Notification Form” by the end of the next Business Day following such access.

**Examples of Maintenance Included in the Five Business Day Notification Period**

* EPS Meter maintenance.
* Removal of any EPS Metering Facility wiring.
* Maintenance to non-EPS Metering equipment that is connected to the EPS Metering circuit.

**Examples of Changes Included in the Ten Business Day Notification Period**

* EPS Metering equipment changes or replacements (non emergency).
* EPS Metering equipment reprogramming (non emergency).
* Upgrade the site from “temporary metering” to “permanent metering.”
* Changes to equipment used in the calculation of the auxiliary Load telemetry provided to an EPS Meter (non-emergency).
* Planned modifications to the calculation of the auxiliary Load in the Resource Entity equipment as recorded on the “Resource Entity Access to Auxiliary Load Telemetry System Notification Form”.

**Examples of Repairs Included in the Immediate Notification Period**

* This category is for unplanned work being performed to repair EPS Metering Facilities due to a failure.
  + Communication failure to an EPS Meter.
  + Meter reprogramming.
  + EPS Meter replacements.
  + EPS instrument transformer replacements.
  + Replacement or repair of equipment used in the calculation of the auxiliary Load telemetry provided to an EPS Meter.
  + Immediate modifications to prevent under reporting of the calculation of the auxiliary Load in the Resource Entity equipment as recorded on the “Resource Entity Access to Auxiliary Load Telemetry System Notification Form”.

**Planned Maintenance or Testing of Equipment**

* The primary and the backup meters shall not be taken out of service during the same Settlement Interval (15-minute time interval), unless the scope of work requires both meters being out of service at the same time.
* Before removing an EPS meter from service, the TDSP EPS Meter Inspector shall:
  + Notify ERCOT that the meter shall be removed from service by calling ERCOT MDAS at (512) 248-6500. A voice mail message is considered adequate notification.
  + If there is not a certified backup meter, ensure that interval data is downloaded from the meter. Such meter download shall be in a format that allows the creation of an MDAS compatible file format (Example: HHF File, P-File, E-File, CSV file) for such data. This can be accomplished by:

(a) ERCOT polling the meter.

(b) The TDSP polling the meter.

(c) The TDSP downloading the interval data.

* If the EPS meter is an ONLY meter or the changes/maintenance cannot be performed without pulling the primary and backup meter(s) out of service during the same 15-minute time interval.

(a) The TDSP shall make arrangements to assist ERCOT in the estimation of meter data for the metering point before the meter is removed from service.

(b) ERCOT will ask the TDSP to provide 15-minute interval data to be utilized to perform the edit in the ERCOT MDAS system.

(c) If the TDSP determines that 15-minute interval data cannot be provided, ERCOT will perform the edit with the assistance of the TDSP so that reasonable data is available as per the Protocols for Settlement billing.

* ERCOT recommends that during normal business hours, the TDSP should request to have ERCOT poll the meters to see that they are back in proper working condition and perform a Load verification.

**Repairs of Equipment**

NOTE \*\*\* If the metering at an EPS Metering Facility is totally out of service, then changes/maintenance or repairs may be completed before ERCOT is notified. Once the EPS Meters are back in service, arrangements for the data to be provided or estimated will be handled at that time.

**Settlement Metering Operating Guide**

**Section 12**

**Attachment C**

**TDSP Access to EPS Metering Facility**

**Notification Form**

**May 1, 2025**

**TDSP ACCESS TO EPS METERING FACILITY NOTIFICATION FORM**

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Notification requirement – Please mark the appropriate box** | | | | | | | | | | | |
|  | Immediate - Unplanned work to repair failed equipment | | | | | | | | | | |
|  | Five (5) days - Planned maintenance or testing of equipment | | | | | | | | | | |
|  | Ten (10) days - Planned changes to equipment (replacement or programming) | | | | | | | | | | |
| Date the access is required | | | | |  | | | Estimated duration of access | | |  |
| If the required Protocol notification period was not adhered to, provide the reason. | | | | |  | | | | | | |
| **Information as recorded on the approved EPS Metering Design Proposal** | | | | | | | | | | | |
| TDSP Name | | | |  | | | | | | | |
| Facility name | | | |  | | | | | | | |
| Unit or Load Name | | | |  | | | | | | | |
| TDSP Project Number | | | |  | | | | | | | |
| **Information as recorded on the submitted MDAS form** | | | | | | | | | | | |
| Meter serial number | | | |  | | | | | Meter device ID |  | |
| **Purpose of the required access** | | | | | | | **Specific Reason / Details** | | | | |
|  | Meter Test | | | | |  | | | | | |
|  | Meter Replacement | | | | |  | | | | | |
|  | CT/VT Replacement  Ratio Change?  No Yes | | | | |  | | | | | |
|  | Meter Reprogramming | | | | |  | | | | | |
|  | Wiring Change | | | | |  | | | | | |
|  | Non-EPS Equipment Maintenance | | | | |  | | | | | |
|  | Other | | | | |  | | | | | |
| **Source that settlement data will be available from while access is required** | | | | | | | | | | | |
|  | | | Back-up meter (Provide the meter serial number in the space provided) | | | | | | | | |
|  | | | TDSP Meter Reading System | | | | | | | | |
|  | | | Portable Reader File (MDAS compatible) | | | | | | | | |
| Other (explain) | |  | | | | | | | | | |
| E-mail the completed form to mreads@ercot.com | | | | | | | | | | | |