Instructions for Qualifying or Being Approved as a Meter Data Management Agent (MDMA)

Background
The CPUC Decision on the Meter and Data Communication Standards Workshop Report of December 3, 1997, directed the UDCs to develop a Meter Data Management Agent qualification/approval process for those ESPs and MDMAs who wish to offer MDMA services.

The CPUC requires that potential MDMAs comply with current UDC standards in experience, education and training in order to perform the following functions of an MDMA:
- Manage the meter reading schedule
- Read and retrieve meter data
- Calculate usage
- Validate, edit and estimate meter data
- Format data
- Manage data on MDMA server
- Meter/device management

The intent of this document is to provide instructions on what is required to become a qualified/approved MDMA.

Application
The potential MDMA completes the "Interim Application for MDMA Services." (Attached).

Checklist
A checklist identifying all required written documentation will also be included with the application. (Attached).

Written Requirements
The potential MDMA forwards the completed application, the checklist, as well as all written requirements to the appropriate UDC ESP Services/Relations Organization.

Customer Choice Services	ESP Relations	ESP Administration
SCE	**PG&E**	**SDG&E**
6020 N. Irwindale Avenue, Suite I	P.O. Box 770000	8326 Center Park Ct
Irwindale, CA 91702	Mail Code H28B	Suite 6200
Attn: Electronic Communications Coordinator	San Francisco, CA 94177	San Diego, CA 92123-1582

The UDCs will review the submitted documentation, determine if the potential MDMA's standards are consistent with the UDC's standards, and notify the MDMA via e-mail. The UDCs have established a goal of 10 business days to review the documentation and respond to the potential MDMA. "Omitted" documentation of the submitted written requirements will result in the UDC requesting that additional information. MDMAs will be notified to submit "omitted" information. However, insufficient requirements will require the potential MDMAs to resubmit that portion of the requirements.

Once the potential MDMA's application and documentation are complete, and the MDMA has passed the server acceptance test, after coordination with the UDC's Meter Reading organization concerning read scheduling, the MDMA may begin to immediately offer services.

Server Acceptance Test
After the UDC receives the completed qualification documentation, the potential MDMA may contact the UDC to schedule the acceptance test. SCE applicants may contact the Meter Operations Support Desk (MOSD) at 1-800-203-4634.

The UDC will then provide the potential MDMA with data for the server acceptance test. The purpose of the server acceptance test is for the potential MDMA to demonstrate that it can calculate usage, validate, estimate and edit usage; format the usage in the California Metering Exchange Protocol (CMEP) or Electronic Data Interchange (EDI) formats; post the data to the potential MDMA's server; and provide the UDC with automated access to the server. Detailed steps are outlined in the MDMA Server Acceptance Testing document.

The acceptance test is then performed. The UDCs have established a 48 hour turn-around time requirement for the completion of this test.

If the potential MDMA fails the server acceptance test the first time, it can reschedule for a re-test. However, if a failure occurs twice, the potential MDMA must wait three months before re-testing will be allowed.

In addition, re-testing will be required if new software is installed or if new technology is implemented by the potential MDMA.

Back-up Reading Process
If the potential MDMA's primary source of reading meters is a method other than the manual process, the potential MDMA, in addition to submitting documentation on its primary method, must also demonstrate that it has a capable back-up process in place (details of this are outlined in the attached checklist).

Data Format
MDMA data format requirements for each UDC are included in the package as an Appendix.

Security and Confidentiality
Data security and confidentiality requirements are outlined in more detail by each UDC. However in general, data must be located in a secure facility and have a firewall or equivalent protection.

Help Desk
The CPUC decision requires that a technical help desk be provided by the UDCs as well as MDMAs. Each UDC must have toll free numbers available. All potential MDMAs must provide 24/365 access to technical assistance. This includes help desk phone number, e-mail address, contact names and pager numbers. The help desk phone must be answered promptly during normal business hours. However, the after-hour calls regarding the server must be returned within one hour. All other after-hour calls can be deferred to the next business day.