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## Purpose


Provides guidelines throughout the Metering Certification process including the initial submission of information, site and Meter Data validation, and maintaining the certified Metering Facility.

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## 1. Responsibilities

<b>ISO Energy Data Acquisition Specialists(EDAS) Team</b>	<ul style="list-style-type: none"> <li>• Validate all required metering documents according to New Resource Implementation timeline (Buckets).</li> <li>• Input meter configuration information into internal meter collection system based on information from the ISO Meter Configuration Worksheet.</li> <li>• Establish meter communication(s).</li> <li>• Support related testing for synchronization <ul style="list-style-type: none"> <li>○ If applicable, request for Hand Held Format (HHF) file(s) from the ISO Authorized Inspector in the event that the ISO is not able to communicate with the respective meter(s).</li> </ul> </li> <li>• Perform meter data validation and issuance of Certificate of Compliance required to achieve Commercial Operational Date (COD).</li> </ul>
<b>ISO Metered Entity (ISOME)</b>	<ul style="list-style-type: none"> <li>• Provide required documentation according to New Resource Implementation (NRI) timeliness.</li> <li>• Ensure that the external field personnel who installs/programs any meter(s) within the Certified Meter Facility is different from the ISO Authorized Inspector who inspects the meter.</li> <li>• Ensure meter communications are operational with the ISO.</li> <li>• Secure Fieldwork Support from the ISO to support troubleshooting and/or testing.</li> <li>• Ensure that their Metering Facilities continue to comply with the certification criteria referred to in the CAISO tariff and the Business Practice Manuals.</li> </ul>
<b>ISO Authorized Inspector</b>	<ul style="list-style-type: none"> <li>• Fill out the ISO Meter and Site Verification Sheet (MSVS) and forward it to the ISOME for review.</li> <li>• Perform testing and inspection of the Meter Facility.</li> <li>• Ensure that the meter is programmed using the read-write password.</li> <li>• If applicable, forward the HHF to <a href="mailto:edas@caiso.com">edas@caiso.com</a> within two (2) business days after operational testing.</li> </ul>

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## 2. Scope/Applicability

### 2.1 Background

This process is to ensure all related documentation, tests, and validations are performed resulting in the issuance of the Certificate of Compliance. The Certificate of Compliance is required to commercially participate and generate settlement statements based on Meter Data within the ISO market.

### 2.2 Scope / Applicability

This procedure includes an overview of the ISO Meter Facility certification process and requirements for maintaining the Metering Facilities.

## 3. Procedure Detail

### 3.1 Certifying Metering Facilities


#### 3.1.1 Initializing the Process

The following actions take place to obtain a Certification of Compliance for a new or existing site:

Description
To obtain a Certificate of Compliance (prior to the installation of any metering equipment) it is necessary for the execution of the actions below:

ISO Metered Entity Actions
<ol style="list-style-type: none"> <li>1. Refer to <u>New Resource Implementation (NRI) Guide and Checklist</u> for information and direction about how to get started. The ISO will provide support documentation, a Certification Checklist, and describe how to locate information about meter installation on the ISO webpage. <ul style="list-style-type: none"> <li>• Email: <a href="mailto:EDAS@caiso.com">EDAS@caiso.com</a></li> </ul> </li> <li>2. If New Site, <ul style="list-style-type: none"> <li>• Refer to <u>New Resource Implementation (NRI) Guide and Checklist for information and direction about how to get started.</u> <ul style="list-style-type: none"> <li>○ The ISO will provide support documentation, a Certification Checklist, and describe how to locate information about meter installation on the ISO webpage  <a href="http://www.caiso.com/participate/Pages/ResourceInterconnectionGuide/default.aspx">http://www.caiso.com/participate/Pages/ResourceInterconnectionGuide/default.aspx</a></li> </ul> </li> </ul> </li> </ol>

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ISO Metered Entity Actions
<p>3. If Existing Site,</p> <ul style="list-style-type: none"> <li>• <b>Contact</b> the ISO prior to making any modifications to existing metering equipment at <a href="mailto:EDAS@caiso.com">EDAS@caiso.com</a>.</li> </ul> <p><i>Note: Meter replacement(s) or meter reprogram(s) will require the creation of new Device ID(s) to differentiate it from the existing metering equipment(s).</i></p> <p>4. <b>Provide</b> the following metering documentation per NRI process timelines:</p> <ul style="list-style-type: none"> <li>• Schematics <ul style="list-style-type: none"> <li>○ Three-Line Drawings</li> <li>○ Detailed Station One-Line</li> <li>○ Communication Block Diagram</li> </ul> </li> <li>• The ISO Meter Configuration Worksheet and ISO Meter and Site Verification Sheet (MSVS) can be found at: <a href="http://www.caiso.com/participate/Pages/MeteringTelemetry/Default.aspx">http://www.caiso.com/participate/Pages/MeteringTelemetry/Default.aspx</a></li> <li>• Transformer and Line Loss Worksheets, where applicable</li> <li>• Distribution Compensation Factor (DCF) engineering study with letter of agreement of DCF from appropriate UDC/Distribution Company/Interconnection entity</li> <li>• Supplemental Documentation which may be required at ISO discretion: <ul style="list-style-type: none"> <li>○ Map to the site</li> <li>○ Contact personnel</li> <li>○ System Description Overview</li> </ul> </li> </ul>


ISO EDAS Actions
<ol style="list-style-type: none"> <li>1. <b>Ensure</b> completeness and overall accuracy according to NRI timelines.</li> <li>2. <b>Validate</b> submitted meter documentation to avoid delays in meter certification.</li> <li>3. If documentation is missing, incomplete or inaccurate, <ul style="list-style-type: none"> <li>• <b>Notify</b> the ISO Metered Entity (ISOME) and provide details of issue(s).</li> </ul> </li> <li>4. If there is no questionable information, <ul style="list-style-type: none"> <li>• <b>Go</b> to <a href="#">Section 3.1.2</a>.</li> </ul> </li> </ol>

### 3.1.2 Meter Installation Activity

Once the required metering documents have been approved, the meter installation process begins:

ISO Metered Entity Actions
<ol style="list-style-type: none"> <li>1. ISOME has meter(s) and associated equipment <b>installed</b> per tariff/BPM requirements and approved drawings.</li> </ol> <p><i>Note: The installed meter(s) must be listed on the Approved ISO Meter document found at: <a href="http://www.caiso.com/market/Pages/MeteringTelemetry/Default.aspx">http://www.caiso.com/market/Pages/MeteringTelemetry/Default.aspx</a>.</i></p>

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ISO Metered Entity Actions
<p>2. Once the meter(s) and associated equipment are installed, the ISOME must <b>secure</b> an ISO Authorized Inspector (<u>Different</u> from the vendor who installed and/or programmed the meter) <u>and</u> have the metering equipment <b>validated</b>.</p> <p><i>Note: The inspector must be from the ISO Authorized Inspectors document found at: <a href="http://www.caiso.com/market/Pages/MeteringTelemetry/Default.aspx">http://www.caiso.com/market/Pages/MeteringTelemetry/Default.aspx</a>.</i></p> <p>3. <b>Submit</b> ISO Meter Configuration Worksheet at least ten (10) business days prior to the operational testing date. This will allow ISO <b>EDAS</b> to set-up configuration in <b>the</b> internal meter collection system.</p> <p>4. A successful communication test (based on the information capture within the form) <b>is required</b> to secure and execute the Operational Test.</p> <p><i>Note: The Site Owner is responsible for the accuracy of the information on this form. The submission must comply with the NRI time frames found at: <a href="http://www.caiso.com/participate/Pages/ResourceInterconnectionGuide/default.aspx">http://www.caiso.com/participate/Pages/ResourceInterconnectionGuide/default.aspx</a>.</i></p>


### 3.1.3 Communication Test

ISO Metered Entity
<p>1. <b>Verifies</b> the installation of the installed meter and associated equipment.</p> <ul style="list-style-type: none"> <li>• Technical Specifications can be found in Attachment B within the Metering Business Practice Manual.</li> </ul> <p>2. <b>Informs</b> the ISO of readiness for Operational Testing by scheduling an appointment via the ISO Fieldwork Appointment Request User Interface (UI)</p> <p><i>Note: Meter communications should be successful to avoid delays in meter testing.</i></p>

ISO EDAS
<p>1. <b>Input</b> meter information into internal meter collection system based <b>on</b> information from the ISO Meter Configuration Worksheet.</p> <p>2. <b>Conduct</b> communications test against the installed meter(s).</p>

ISO Metered Entity Actions
<p>1. <b>Ensure</b> successful communication test between the meter and the ISO prior to Operational Testing.</p> <ul style="list-style-type: none"> <li>• A fieldwork appointment is not required to check the communication to the Meter prior to the point-to-point test. Site owner(s) can simply either call EDAS or send an email to <a href="mailto:EDAS@caiso.com">EDAS@caiso.com</a> to verify the communication.</li> </ul>

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ISO Metered Entity Actions
<p><i><b>Note:</b> Communication testing must be successful in order to perform the Operational Test.</i></p> <ol style="list-style-type: none"> <li>2. If Communication is unsuccessful, <ul style="list-style-type: none"> <li>• <b>Work with</b> vendor <u>and</u> <b>notify</b> ISO personnel once it has been resolved to re-test.</li> </ul> </li> <li>3. If Communication is unsuccessful the day of the Operational Test, <ul style="list-style-type: none"> <li>• The test will be <b>cancelled</b> <u>and</u> will <b>need to be rescheduled</b> once communications to the meter(s) have been reestablished.</li> </ul> </li> </ol>

### 3.1.4 Operational Test


The Operational Test is to validate the Meter Data interrogated from the ISO certified meter corresponds to a given test scenario/condition.

Certified Meter Inspector, ISO EDAS, and ISO Metered Entity Actions
<ol style="list-style-type: none"> <li>1. <b>Perform</b> Operational Test in accordance with the Meter Program Validation document found at:  <a href="http://www.caiso.com/market/Pages/MeteringTelemetry/Default.aspx">http://www.caiso.com/market/Pages/MeteringTelemetry/Default.aspx</a> </li> </ol> <p><i><b>Note:</b> The ISOME ensures all necessary access to meters and Metering Facilities for inspection and testing by ISO Authorized Inspectors.</i></p>

ISO EDAS
<ol style="list-style-type: none"> <li>1. If applicable, <b>request</b> for Hand Held Format (HHF) file(s) from the ISO Authorized Inspector in the event that the ISO is not able to communicate with the respective meter(s).</li> <li>2. <b>Confirm</b> that the meter is programmed using read-write access.</li> </ol>

Certified Meter Inspector Actions
<ol style="list-style-type: none"> <li>1. <b>Ensures</b> that the Operational Test was performed successfully.</li> <li>2. <b>Verifies</b> any remaining testing and inspection.</li> <li>3. Before leaving the Metering Facility, the inspector must <b>place meter seals</b> on all appropriate equipment.</li> <li>4. <b>Create/update</b> <u>and</u> <b>submit</b> final MSVS to ISOME for submission to the ISO.</li> <li>5. If applicable, <b>forward</b> the downloaded Hand Held Format (HHF) file(s) to <a href="mailto:EDAS@caiso.com">EDAS@caiso.com</a> at least two (2) business after the operational test.</li> </ol> <p><i><b>Note:</b> The ISOME is responsible for the submission of all documentation to the ISO before Meter Data validation can occur.</i></p>

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ISO Metered Entity Actions
<ol style="list-style-type: none"> <li>1. <b>Send</b> the MSVS to the ISO and notify the ISO of meter passing inspection.</li> </ol>

### 3.1.5 Meter Data Validation Activity

ISO EDAS Actions
<ol style="list-style-type: none"> <li>1. <b>Gather</b> meter generation data in order to perform validation.</li> <li>2. <b>Conduct</b> Meter Data validation against the meter to ensure proper programming, documentation, and functionality.   <i><b>Note:</b> The ISO reserves the right to perform a field audit.</i> </li> <li>3. If meter validation fails, <ul style="list-style-type: none"> <li>• <b>Work with</b> ISOME to resolve the issue until successful.</li> </ul> </li> <li>4. <b>Review</b> Final Meter Package once meter validation is successful.</li> <li>5. If Final Meter Package is complete, <ul style="list-style-type: none"> <li>• The ISO <b>will issue</b> a Certificate of Compliance <u>and</u></li> <li>• <b>Notify</b> ISOME of Commercial Operational Data (COD).</li> </ul> </li> </ol>

ISO Metered Entity Actions
<ol style="list-style-type: none"> <li>1. If Final Meter Package is not complete, <ul style="list-style-type: none"> <li>• <b>Submit</b> missing/corrected documentation to the ISO.</li> </ul>   <i><b>Note:</b> The ISO will not issue a Certificate of Compliance unless the Final Meter Package is complete. The required information can be found in Attachment C and 3.2.3.4 of the BPM for Metering.</i> </li> </ol>

## 3.2 Responsibilities for Maintaining Certificate of Compliance


### 3.2.1 Facility Maintenance

If the Metering Facility is in need of maintenance, the Metered Entity is responsible for the following actions:

Description
<p>Once an ISO Metered Entity has a Certificate of Compliance it is necessary to maintain the facility in accordance with the CAISO tariff and Business Practice Manual for Metering. If the Metering Facility is judged to be out of compliance by the ISO, the Certificate of Compliance may be revoked.</p>

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ISO Metered Entity Actions
<p>1. <b>Inform</b> the ISO <u>prior</u> to any replacements, changes, or modifications that are made to any meters or Metering Facilities of an ISO Metered Entity that has been certified.</p> <ul style="list-style-type: none"> <li>• Under CAISO Tariff Section 10.2.4.7, the ISO <b>may require</b> the recertification of the Metering Facility if desired.               <ul style="list-style-type: none"> <li>○ Emails should be <b>sent</b> to <a href="mailto:EDAS@caiso.com">EDAS@caiso.com</a>.</li> </ul> </li> </ul> <p><i><b>Note:</b> For any site maintenance that involves the removal of ISO seals, it is necessary to contact the ISO in accordance with Section 5.1.4 of the BPM for Metering and Section 10.2.13.1 of the CAISO tariff.</i></p> <p>2. <b>Continue to comply</b> with the certification criterion that is found within the CAISO tariff and the Business Practice Manual for Metering.</p> <ul style="list-style-type: none"> <li>• Section 10.2.4.5 in the CAISO tariff <b>requires</b> ISO Metering Entities to <b>follow the criteria</b> found in the CAISO Tariff as well as Business Practice Manual Appendix C.</li> </ul> <p><i><b>Note:</b> If Field Support is needed, an appointment must be scheduled in advance by using <b>Fieldwork Appointment Request Form</b> at:</i></p> <p><a href="http://www.caiso.com/fieldworksupport/Pages/default.aspx">http://www.caiso.com/fieldworksupport/Pages/default.aspx</a>.</p>


### 3.2.2 Certificate Revocation

If the ISO believes a Metered Entity to be out of compliance, the following actions may be taken:

ISO EDAS Actions
<p>1. Under Section 3.2.3.9 of the BPM for Metering, the ISO <b>may revoke</b> any Certificate of Compliance if there are reasonable grounds to believe that the ISO Metered Entity no longer meets the certification criteria found in the CAISO tariff and the Business Practice Manual.</p> <p>2. If the ISO chooses to <b>revoke</b> a Certificate of Compliance and has given written notice to the relevant ISO Metered Entity stating that it does not believe that the identified Metering Facilities meets the certification criteria:</p> <ul style="list-style-type: none"> <li>• The ISO will <b>not accept</b> Revenue Quality Meter Data (RQMD) from an ISO Metered Entity unless that RQMD is produced by a currently certified Metered Entity in accordance with Section 10.2.4.6 of the CAISO Tariff.</li> <li>• ISO Metered Entities may <b>seek recertification</b> of the relevant Metering Facilities in accordance with Section 10.2.4.6 of the CAISO Tariff.               <ul style="list-style-type: none"> <li>○ Any appeals may be made to <a href="mailto:EDAS@caiso.com">EDAS@caiso.com</a>.</li> </ul> </li> </ul>

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### 3.3 Installation of Additional Metering

#### 3.3.1 ISO Metered Entity Election to Install Additional Metering

If the ISO Metered Entity chooses to install additional metering the following actions must be taken:

Description
<p>If there is a desire to install any additional meters or equipment within the certified Metering Facilities it is necessary for the ISO and ISO Metered Entity to properly coordinate on the installation process in accordance with Section 10.2.14 of the CAISO tariff and Section 3.3 of the BPM for Metering.</p>


ISO Metered Entity Actions
<ol style="list-style-type: none"> <li>1. <b>Inform</b> the ISO before any changes or modifications are made to any Metering Facilities of an ISO Metered Entity that have been certified. <ul style="list-style-type: none"> <li>• An ISO Metered Entity may <u>not</u> <b>start installation</b> of additional metering until the ISO has approved its proposal for installation.</li> <li>• Depending on the changes made to the Metering Facilities, it may be necessary to <b>re-inspect</b> or <b>test</b> all, or part, of the Metering Facilities.</li> </ul> </li> <li>2. Under Section 3.3.3 of the BPM for Metering, if an ISO Metered Entity <b>installs</b> additional metering, such metering must, unless the ISO agrees otherwise: <ul style="list-style-type: none"> <li>• <b>Be installed <u>and</u> maintained</b> at the ISO Metered Entity's cost;</li> <li>• <b>Be located</b> on the ISO Metered Entity's side of any primary meter; <u>and</u></li> <li>• <b>Not interfere</b> with the accuracy of any primary meter and, if that primary meter is directly polled by the ISO, the ISO's ability to directly poll that meter.</li> </ul> </li> </ol>

#### 3.3.2 ISO Requirement to Install Additional Metering

Under Section 3.3.2 of the BPM for Metering, an ISO Metered Entity that is notified by the ISO that it is required to install additional Metering Facilities must:

ISO Metered Entity Actions
<ol style="list-style-type: none"> <li>1. <b>Provide</b> the ISO written confirmation of receipt of that notice within three (3) Business Days of receiving that notice.</li> <li>2. <b>Submit</b> a proposal for installation to the ISO within 45 Business Days of receiving that notice containing the following information: <ul style="list-style-type: none"> <li>• A description of the proposed Metering Facilities to be installed (which includes all relevant schematic drawings and one-line drawings).</li> </ul> </li> </ol>

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ISO Metered Entity Actions
<ul style="list-style-type: none"> <li>• A proposed timetable for installation.</li> <li>• Any other information requested by the ISO.</li> </ul> <p>3. Upon ISO approval of the submitted installation proposal, the Metered Entity may <b>begin</b> the installation process.</p> <p><i><b>Note:</b> Depending on the reason for installing additional metering, the Metering Facility may be subject to re-inspection and/or re-certification once the installation is completed.</i></p>

## 4. Supporting Information

### Operationally Affected Parties

Shared on the Internet.

### References

Resources studied in the development of this procedure and that may have an effect upon some steps taken herein include but are not limited to:

<u>CAISO Tariff</u>	Section 10
<u><a href="#">Business Practice Manual for Metering</a></u>	Sections 3.2 and 3.3


### Definitions

Unless the context otherwise indicates, any word or expression defined in the Master Definitions Supplement to the CAISO tariff shall have that meaning when capitalized in this Operating Procedure.

The following additional term(s) are capitalized in this Operating Procedure when used as defined below:

NRI	New Resource Implementation
-----	-----------------------------

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### Version History

Version	Change	Date
1.0	Document Implementation	11/19/13
1.1	Periodic Review – No content changes. Updated logo in header.	5/23/16
1.2	Changed Meter Engineering to EDAS and updated email address.	7/28/16
1.3	Updated the following sections: 1. 1 - Responsibilities 2. 3.1.1 – Initializing the Process 3. 3.1.2 – Installation Activity 4. 3.1.3 – Communication 3.1.4 - Operational Test	10/07/16
1.4	Section 3.1.1, Step 3: Corrected link and removed verbiage that MSVS had to be received prior to the operational test. Minor format and grammar updates.	2/14/18
2.0	Periodic Review: Removed references to MDAS. Section 3.1.3: Combined MDAS actions with EDAS actions table. Minor format and grammar updates. Included document control statement in footer.	1/16/20

## 5. Periodic Review Procedure


### Review Criteria & Incorporation of Changes

There are no specific review criteria identified for this procedure, follow instructions in Procedure 5510.

### Frequency

**Every 3 Years.**

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## Technical Approval

Reviewed By Content Expert	Date
Manager, Model & Contract Implementation	1/08/20
Operations Procedures	1/09/20

## Director Approval

Approved By	Date
Director, Market Services	1/09/20

## Appendix

No references at this time.