

# Metering Task Force Kick-off and Plan

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**Metering Task Force**

July 30, 2019, Krey Corporate Center, Rensselaer, NY

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# Background

- The Metering Task Force (MTF) reports to the Billing, Accounting, and Credit Working Group (BACWG).
- The intent of the Task Force is to provide a venue for discussion with Stakeholders regarding changes to be made to metering requirements and processes as a result of upcoming projects. This process will be focused on the review and discussion of documentation changes needed for successful implementation of these projects.
- The primary focus of the MTF will be related to:
  - Implementation of the Meter Services Entity and Metering Service Administration concepts (Phase 1 and 2).
  - Requirements and implementation of metering requirements for Energy Storage Resources (ESR)
  - Requirements and implementation of Distributed Energy Resources (DER).

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# Project Implementation Schedule

- **Implementation of Meter Services Administration/ Meter Services Entities**
  - Phase 1: July through November 1, 2019 – focused on the requirements necessary to allow MSEs to provide metering services to participate in the EDRP and SCR Programs
  - Phase 2: Q3 2020 through Q3 2021 – focuses on requirements necessary to allow MSEs to provide metering services to DER.
- **Energy Storage Resources (ESR)**
  - July 2019 through implementation of ESR market design (currently scheduled for June 2020)
  - Focused on developing the specific metering requirements necessary for ESRs
- **Distributed Energy Resources (DER) Participation**
  - July 2019 through implementation of DER market design (currently scheduled for Q4 2021)
  - Focused on developing the specific metering requirements necessary for DER

# Project Implementation Requirements

- **Meter Service Administration (MSA)/Meter Service Entity (MSE)**
  - The NYISO plans to review the following aspects of the MSA/MSE implementation:
    - Application process
    - Required documentation of meters
    - Audit requirements for active meters
    - Billing of costs for NYISO staff and resources or consulting costs
  - Documentation review will include:
    - Technical Bulletin for MSEs (Posting Target – September 30)
    - Accounting and Billing Manual updates (October BIC)
    - Revenue Metering Requirements Manual (RM<sup>2</sup>) updates (September/October BIC)
    - Implementation of the Metering Service Entity Manual (MSEM) (December 2019)

# Project Implementation Requirements, cont.

- **Meter Service Entity Manual (MSEM)**

- This is an entirely new manual.
- The plan for implementation of the manual will be to review and bring to BIC for approval the appropriate sections of the manual for the Phase 1 of the MSA/MSE implementation by December 2019.
- Phase 2 implementation will begin in the late summer of 2020, following the deployment of ESR, in support of the DER Participation Model.

# Project Implementation Requirements, cont.

- **Energy Storage Resources Implementation (June 2020)**
  - Many of the metering related impacts to the manuals in question will be updated for the ESR project but will also apply to DER the following year.
  - Manuals to be updated, reviewed, and approved:
    - Accounting & Billing Manual (Target – March 2020)
    - Revenue Metering Requirements Manual (RM<sup>2</sup>) (Fall 2019)
- **The MTF addresses only the changes to these manuals with respect to metering. There will be significant additional changes to these manuals for the ESR model that impact settlement algorithms. These changes will be addressed solely at BACWG and BIC.**

# Project Implementation Requirements, cont.

## ■ DER Participation Implementation (Q4 2021)

- This round of updates will address any metering specific updates that were not covered in the ESR or in the MSE/MSA Phase 1 implementations.
- Manuals to be updated, reviewed, and approved:
  - Accounting & Billing Manual (Target – TBD)
  - Revenue Metering Requirements Manual (RM<sup>2</sup>) (Target – TBD)
  - Metering Service Entity Manual ( Target – TBD)

## ■ More information on the timing of these updates will be communicated as the deployment schedule becomes more clear.

# Metering Task Force Schedule

- **Reminder: All NYISO manuals must be reviewed at a Working Group meeting prior to being presented to the Business Issues Committee (BIC) for approval.**
- **Scheduled Conference Call meeting dates (all times are planned for 10am):**
  - August 9<sup>th</sup>
  - September 3<sup>rd</sup> and 13<sup>th</sup>
  - October 4<sup>th</sup>, 17<sup>th\*</sup>, and 29<sup>th</sup>

(\* Indicates the meeting will be after the scheduled OC that day).



# BACWG and BIC Schedule

## ■ BACWG

- August 23<sup>rd</sup> – RM<sup>2</sup> and Accounting & Billing Manual
- September – none currently scheduled – follow-up on the above manuals as needed.

## ■ Business Issues Committee (all targets are tentative)

- September 11<sup>th</sup> - RM<sup>2</sup> and/ or A&B Manual
- October 16<sup>th</sup> - MSE/MSA Manual
- November 6<sup>th</sup> - MSE/ MSA Manual
- December 11<sup>th</sup> - MSE/MSA Manual

# Questions?

# The Mission of the New York Independent System Operator, in collaboration with its stakeholders, is to serve the public interest and provide benefits to consumers by:

- Maintaining and enhancing regional reliability
- Operating open, fair and competitive wholesale electricity markets
- Planning the power system for the future
- Providing factual information to policy makers, stakeholders and investors in the power system



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