



Subject: Meter Services Entity

Statement: This Technical Bulletin addresses the requirements for an entity participating as a Meter Services Entity.

Details:

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Roles and Responsibilities:

Meter Services Entity (MSE) provision of physical metering services and meter data services to NYISO Market Participants requires the MSE, NYISO, and Market Participant to undertake certain roles and responsibilities. The responsibilities for each entity include, but are not limited to, the items described below:

MSE responsibilities:

- MSE shall provide to the connecting utility (Member System), upon request, access to revenue grade meter data or meter installation specifications.
- MSE is responsible for the provision of revenue grade meter data in accordance with the Revenue Metering Requirements Manual.
- MSE is responsible for compliance with applicable codes and standards for physical metering equipment installation, testing, and maintenance in accordance with Services Tariff Section 13 and the Revenue Metering Requirements Manual.

Market Participant responsibilities:

- Market Participant is responsible for the costs associated with the administration of MSE(s) it uses pursuant to Services Tariff Section 15.10.
- Market Participant is responsible for any applicable penalties issued as a result of metering or meter data services that do not comply with the NYISO tariff and NYISO procedures.
- Market Participant assumes all responsibility for NYISO scheduling and dispatch, communicating to the resource its directed operating point, and providing revenue grade telemetry data from the resource back to the NYISO indicating the resource's operating level.
- MP shall be responsible for the completion and submission of the Meter Inventory, as requested by the NYISO.

NYISO responsibilities:

- Administer the MSE registration and meter inventory process.
- Audit VEE methodology and actual calculations using data provided by MSE and/or Market Participant.
- Analyze metering and data anomalies as reported to it by the MSE or Market Participant.
- Coordination with the Market Participant or MSE to ensure proper operation and transport of meter data to the NYISO.



Eligibility for Meter Services Entity Authorization

Pursuant to Services Tariff Section 13.3.2, an entity may apply to be an authorized MSE in order to provide physical metering (*i.e.*, the installation, calibration, physical security, maintenance, meter programming and configuration of meters and other metering hardware) and meter data services (*i.e.*, the collection, retention, communication and security of revenue meter data and telemetry data, and the validation, editing and estimation of that data) to NYISO Market Participants. This section describes the requirements and criteria to become authorized to provide those services.

Registration Submittal Requirements

1. Prior to submitting the MSE Registration Packet, the Applicant must register as either (i) a NYISO Market Participant, or (ii) a NYISO Guest. Information on registering to be a Market Participant or Guest is available at customer_registration@nyiso.com.
2. MSE Registration Packet and Application Fee

Applicants are required to complete the Meter Services Entity Registration Packet and submit it to the NYISO accompanied by payment of the non-refundable \$1000 application fee. Instructions are provided with the Registration Packet.

The NYISO will begin its review of the registration materials upon receipt of the completed registration packet and payment of the application fee. Within thirty (30) days of receipt of a completed Registration Packet and application fee, the NYISO will either authorize the applicant to be an MSE or seek further information. The NYISO may seek further information from the applicant in order to determine the entity's eligibility to become an MSE. The NYISO must receive all requested additional information within thirty (30) days of its request unless otherwise agreed to by the NYISO and the applicant. The NYISO will reject an application if the requested information is not received within the specified timeframe.

Reoccurring MSE Obligations

Organization Information

The applicant shall submit Organization Information, as defined in the MSE Registration Packet, required for MSE eligibility. If any material changes occur to the MSE's Organization Information after authorization the MSE must notify the NYISO prior to those changes taking effect. On an ongoing basis, the MSE must submit to the NYISO:

1. A listing of the utility service territories in which the MSE intends to provide services; and
2. MSE employees must have appropriate training (*e.g.*, Electric Safety Training, Electric Meter School) such that the employees are sufficiently qualified to provide physical metering services and meter data services. Additionally, an MSE must maintain a training plan to maintain employee training, qualifications and certification to perform those services as necessary

Infrastructure Plan

The NYISO will review the information provided by the MSE in the Infrastructure Plan to assess the plan for completeness. If any material changes occur to the Infrastructure information the MSE is responsible to notify the NYISO prior to those changes taking effect. The Infrastructure Plan must include:

1. Meter Testing Facility
 - A. Access to a meter test facility equipped to determine the performance of electric meters and associated equipment used for revenue metering
 - B. Maintenance plan for testing equipment used for electric meters and associated equipment as defined in the Revenue Metering Requirements Manual Section 3.3
 - C. Commercial standardizing facilities shall be allowed when such facilities can be shown to have appropriate test equipment as defined in the Revenue Metering Requirements Manual Section 3.3
 - D. Meter test standards, ancillary equipment, and instruments used for the testing of electricity meters must be calibrated and traceable, in accordance with the requirements set forth in the Revenue Metering Requirements Manual Section 3.3
 - E. Calibration intervals for all instrumentation used in establishing meter performance shall be determined according to the Revenue Metering Requirements Section Manual 3.3
 - F. Records of calibrations of all instruments used for establishing meter performance must be maintained in accordance with the Revenue Metering Requirements Manual Section 3.3
2. Meter data management practices
 - A. Maintain records of the calibration of all instruments used in the testing of revenue meters in accordance with the Revenue Metering Requirements Manual Section 3.3.2
 - B. Records of retired instruments must be maintained in accordance with the Revenue Metering Requirements Manual Section 3.3.2
 - C. Describe the data Validation, Estimation, and Editing process and rules to be used for meter data in accordance with Section XXX in this Technical Bulletin. If using any industry standards, provide a reference to the respective industry standard and how the MSE is implementing the standard
 - D. For data retention describe the data retention practices, including the data to be retained and the schedule for retention
3. Meter data record recovery process should be maintained in accordance with the Ancillary Services Manual
4. A listing of meter services intended to be provided. For each meter service provided, identify industry standards, internal processes, and/or business practice standards used. As defined by:
 - A. Physical Metering Services including the installation calibration, physical security, maintenance, meter programming and configuration of meters and other metering hardware
 - B. Meter Data Services including the collection, retention, communication and security of revenue meter data and telemetry data, and the validation, editing and estimation of that data

5. For the following categories, refer to the Ancillary Services Manual Section 6.2.4.4.3:
 - A. Physical/Cyber Security
 - B. Environmental Controls
 - C. Redundancy of Infrastructure
 - D. Scalability
 - E. Backup Process

Agreement to Comply with NYISO Tariff and Procedures

The MSE must agree to abide by all associated NYISO requirements located in the Services Tariff, ISO Procedures, and this Technical Bulletin for the supply of physical metering services and/or meter data services. Such requirements may be amended from time to time and the MSE is required to update their registration information as necessary to comply with new requirements, as requested by the NYISO. The MSE must acknowledge that the entity will be subject to audit by the NYISO.

Review Process

An applicant's eligibility will be reviewed by the NYISO in accordance with Market Services Tariff Section 13.3.2.1.3.

Suspension and Revocation

If the NYISO determines that a Meter Services Entity has not complied with the requirements set forth in the ISO Tariffs and ISO Procedures (including this Technical Bulletin) it may suspend or revoke that Meter Services Entity's eligibility to provide Metering and Meter Data Services pursuant to Services Tariff Section 13.3.2.3.2.

If a Meter Services Entity's eligibility is suspended or revoked, the NYISO will: (i) not accept meter data supplied, and (ii) inform the NYISO marketplace of the MSE's status. The MSE will be responsible for notifying any Market Participant to whom it provides Metering or Meter Data Services of its status.

Conditions of Suspension:

The NYISO may suspend an MSE's eligibility to provide metering and/or meter data services to NYISO Market Participants if the NYISO determines that an MSE has not complied with Services Tariff Section 13.3.2 or the ISO Procedures (including the eligibility rules set forth in section Eligibility for Meter Services Entity Authorization of this Technical Bulletin).

An MSE shall have 60 days to remedy any NYISO-identified non-compliance, and the NYISO shall terminate any suspension if the MSE corrects its non-compliance, to the satisfaction of the NYISO, within the 60-day window. The NYISO may, at its sole discretion and based on the individual facts and circumstances of a particular case, extend the 60-day period within which a MSE must come into compliance.

Conditions of Revocation:

The NYISO may revoke an MSE's authorization to provide metering and/or meter data services if (i) the MSE fails to remedy the non-compliance resulting in its Suspension within the timeframe allotted by the NYISO, or (ii) the MSE's non-compliance is not able to be remedied.

An entity whose authorization to be an MSE has been revoked may re-apply for MSE authorization. Any re-application will be reviewed by the NYISO and will not be approved until, in addition to satisfying the generally applicable eligibility requirements, the entity establishes that the non-compliance causing revocation of its prior MSE authorization has been remedied.



The NYISO anticipates that this Technical Bulletin will be incorporated into the initial release of the Meter Services Entity Manual.