Chapter 7

Others

From SCE's Manual



The ESP Handbook

Chapter 12 Terminating Direct Access Services

Version 2.5 November 23, 1998

There are several methods for terminating a Direct Access service account, including:

- ESP or Customer Returning Customer to SCE Bundled Service
- Termination carried out by Customer

Termination carried out by SCE

ESPs can terminate a Direct Access account by submitting a Disconnect DASR to SCE by marking the appropriate fields. A fee may be charged for this service, to be determined by the CPUC. Following this cancellation, a notice will be sent to the ESP and the customer advising them that the customer will be returning to bundled service with SCE.

A customer may elect to terminate its contract with an ESP to return to SCE bundled services by calling SCE's Direct Access Support Customer Center at (800) 799-4723. In such cases, the CPUC has determined that SCE will initiate a cancellation followed by a switch to bundled service or a new ESP in the next DASR processing period. A fee may be charged for this service, to be determined by the CPUC. Edison will notify the prior ESP of the change and will inform them of the scheduled effective date.

If a customer contacts the ESP requesting Turn Off of service at their service location, please have the customer contact the SCE DA Support Center at (800)799-4723. **Do not** send a Disconnect DASR for this request.

When SCE receives a call from a customer requesting a Turn Off of service, a notification e-mail will be sent from the DA Support Center (DASUPPRT@sce.com) to the ESP on the same business day as the call was received stating that the customer has requested their electric service to be turned off. In the case of an external MDMA, a second e-mail with a MASR attachment will be sent from the Meter Operations Support Desk advising the ESP of the effective date of the turn off. The MASR will direct the ESP/MDMA to poll the meter hourly on the day of the turn off.

If the meter is other then SCE owned, SCE will remove the meter. SCE will ship the removed meter to the owner.

If the customer contacts SCE to *re-schedule* the Turn Off, a follow up e-mail and MASR will be sent to the ESP including the rescheduled date. If the customer contacts SCE to *cancel* the Turn Off, an e-mail will be sent to the ESP, it will state the customer has canceled their Turn Off order, please <u>do not</u> terminate service.

ESPs should note that customer movement from one service location to another is equivalent to a change in the Direct Access account, effective the scheduled move date. In the CPUC's October 30, 1997 decision, it was determined that a customer moving to a new premises may retain or start Direct Access immediately, and in any event no later than two days after a DASR has been submitted. In the initial stages of DA implementation, the CPUC has allowed that a customer moving to a new premises who wants to retain or start Direct Access must have the ESP submit a DASR to SCE for the new premises no less than ten (10) business days before the customer's scheduled start date at the new premises. SCE expects to align itself with the CPUC two day policy as soon as system limitations can be overcome.



The ESP Handbook

Chapter 13 Resolving Disputes

Version 2.5 November 23, 1998

Chapter 13: Resolving Disputes

Esps who have a dispute should first contact the ESP Support Center at (800) 795-6723. SCE will make every attempt to work together with the ESP to resolve any concerns that should arise. Should the ESP determine that the issue was not resolved to their satisfaction, the ESP may request to speak to a review Manager in SCE's Consumer Affairs Division.

Any dispute arising between SCE and the ESP, relating to the interpretation of the provisions of the Service Agreement, to the performance of SCE and the ESPs obligations outlined in the Service Agreement (including the performance of Billing Services, Metering Services and MDMA Services, by either Party or disputes related to payment of ESP Charges by SCE), should be submitted to SCE in writing. Pending resolution, SCE and the ESP will continue to uphold their obligations outlined in the Service Agreement. If SCE and the ESP fail to reach an agreement within a reasonable period of time, the dispute can be submitted to the CPUC for resolution, in accordance with the CPUC's rules, regulations, and procedures. SCE and the ESP agree to be bound by the CPUC's decision. Except as outlined below, SCE and the ESP expressly waives any right to file an action in any court relating to any dispute.

In general, SCE is not responsible for the resolution of disputes between other market participants, including those relating to competitive services.

The CPUC shall have initial jurisdiction to resolve disputes regarding SCE's performance of its obligations under the utilities electric rules and tariffs, the SCE-ESP Service Agreement, and requirements related to Direct Access service, including any disputes regarding delays in the implementation of Direct Access, in addition disputes over payment of utility fees under the service agreement or utility charges by the ESP, and disputes between SCE and the ESP regarding Competition Transition Charges payable by customers. The CPUC jurisdiction is appropriate because the subject matter of these disputes concerns the Direct Access tariffs and other related tariff provisions. The filing of complaints relating to Direct Access will also allow the Commission to evaluate potential problem areas, and provide the Commission with an opportunity to remedy those problems.

SCE may pursue available remedies for unauthorized electrical use by the ESP in a court of competent jurisdiction.



The ESP Handbook

Chapter 14 Compliance Testing

Version 2.5 November 23, 1998 SCE has established compliance testing requirements for ESPs interested in providing the following services under Direct Access:

Meter Data Management Agent (MDMA)

This Qualification Package explains SCE's requirements for ESPs interested in providing meter reading and data management services. It can be obtained from the Metering Operation Support Desk at (800) 203-4634. Also available at the Edison International (EIX) Internet website at http://www.sce-mdma.com.

Consolidated Billing

ESPs interested in providing consolidated billing services must transmit and/or receive bill-ready data electronically to and from SCE. In order to select a consolidated billing option, all ESPs will need to meet certain compliance requirements. Compliance packages can be obtained from Electronic Communications Coordinator by e-mail at ESPSUPT@sce.com or contacting directly at (562) 491-2228.



The ESP Handbook

Chapter 16 Load Profiling Information

> Version 2.5 November 23, 1998

16.1 Introduction

Load profiling is the process of taking the cumulative kilowatt-hour (kWh) usage of a customer over a billing cycle and assigning it to individual hours in the cycle, based on the aggregate characteristics of the customer class in which the customer resides. Statistically valid methods are used in the assignment process.

Statistical load profiling will apply a CPUC-authorized class average load profile to determine a single monthly Power Exchange (PX) energy price appropriate for each customer class. Load profiling integrates class average load profiles, hour-by-hour, with the PX hourly energy cost to calculate a weighted average hourly price. Class average load profiles (customers' usage pattern) are developed from statistically valid load research samples.

Southern California Edison (SCE) provides statistical load profiles, in place of interval metering, to permit the utility or ESP to schedule power, settle with the ISO, and compute bills for all customers who have service accounts that do not require, or are exempt from, interval metering. Per CPUC's Load Profiling decision, D. 97-10-086, the customers who are eligible for direct access without installing hourly meters are those with demand less than 20 kW. For SCE, these customers are defined as those in the following rate groups: Domestic (residential), GS-1 (Small Commercial), PA-1 (Small Agricultural & Pumping), TC-1 (Traffic Control), and St_Ltng (Street Lighting).

In addition, customers between 20 and 50 kW are exempt from interval metering and are eligible for load profiling, until January 1999. There will be a workshop held by the CPUC to determine whether the load profiling for customers between 20 to 50 kW should continue past January 1999.

The class average load profiles will also be used for calculations of Competition Transition Charge (CTC) for all customers. This is accomplished by using the average rate group load profile (regardless of that rate group's eligibility for load profiling when electing direct access) in calculating PX energy cost/credit to determine the CTC residually.

SCE created and posted the 1998 static load profiles, for all its 14 rate groups, in October 1997. SCE implemented dynamic load profiling for residential (Domestic-Single/Multiple), Small Commercial (GS-1), and medium commercial/industrial (GS-2) on May 18, 1998. After this date, no party may use the static profiles, for these three rate groups, in billing or settlement. All other rate groups' profiles may be updated annually by using the most recent three years of available historical load profiles. In addition, subject to the Commission approval, SCE may update the static profiles, using more advanced statistical techniques. SCE will provide a 45-day notice to all ESPs prior to the implementation of new load profiles that result from changes in the load profiling methodology.

For information related to Load Profiling in California, refer to the CPUC Load profiling Workshop Websites at "<u>http://162.15.5.2/wk-group/dai/dai1/"</u> and at <u>"http://162.15.5.2:80/wk-group/dai/lp/</u>".

16.2 Static Load Profiles

SCE created statistical static load profiles for all 14 rate groups in October 1997, for use in 1998 (For a list of the rate groups, please refer to section 16.5). These rate groups are the same rate groups that were used in rate design in the 1995 General Rate Case. The only difference is that we provided separate profiles for two subgroups of the Domestic rate group: single/multiple and master metered accounts.

The static load profiles were posted to the CPUC's internet website, at "<u>http://162.15.5.2/wk-group/dai/dai1/"</u>. These same profiles are also posted on our website at http://www.sce-esp.com/eca/loadprofiling/static.htm

Each profile represents a class average annual profile, one for each rate group, developed using a three-year average of historical load research data. This simplified approach has been proposed for interim use in 1998, pending future Commission action on alternative methodologies for the development and use of load profiles.

To develop the static load profiles in compliance with D.97-10-086, we used the existing final sales level load profiles for three years, 1993 - 1995, for each rate group. The final sales level profiles are developed in the process of creating the <u>Annual Rate Group Load Studies</u>. The Load Research group at SCE has been creating the Annual Rate Group Load Studies since 1974. For a detailed description of the methodology used in creating the Annual Rate Group Load Studies, please refer to our website at http://www.sce-esp.com/eca/loadprofiling/history.htm

To create the static load profiles for 1998, we first created monthly day-of-week average profiles for each year (1993-1995). This resulted in 84 (12months x 7 days) profiles. We also created eight separate profiles, one for each holiday in the year. Then we took the average, over three years, of each of these 92 profiles. Each day in 1998 was assigned an average profile based on the month and day of the week. For example, the Wednesday, April 1, 1998, profile is the average of the profiles for all Wednesdays in April of 1993, 1994, and 1995.

16.3 Dynamic Load Profiles

SCE implemented dynamic load profiling for residential (Domestic-Single/Multiple), small commercial (GS-1), and medium commercial/industrial (GS-2) on May 18, 1998. After May 18, 1998, ESPs should use the dynamic load profiles for the above three rate groups in settlement and billing. The dynamic load profiles are posted from April 1, 1998. However, the profiles available prior to May 18, 1998, are test samples and should not be used in billing or settlement.

Currently, SCE posts dynamic load profiles within three working days after the transaction day. SCE sent a letter to all ESP's on May 1, 1998, regarding the availability of our dynamic load profiles. Please refer to that letter for detailed information.

16.4 Obtaining Load Profile Information from SCE

Information on all load profile classes is provided to ESPs upon completion of the SCE-ESP Service Agreement. ESPs are informed of the load profile identification number as part of the CISR or automatically through the DASR process. SCE provides load profiling information for all rate groups to ESPs in order to allow them to schedule power, settle with the ISO, and compute bills for all customers.

On October 16, 1997, SCE posted the static load profiles for 1998, for 14 rate groups, to the CPUC's internet website at "<u>http://162.15.5.2/wk-group/dai/dai1/".</u>

These static load profiles are also available for downloading at the Internet address:

http://www.sce-esp.com/eca/loadprofiling/static.htm

SCE dynamic load profiles are available from April 1, 1998, at the above website.

The same website also contains information related to the methodology of creating the static load profiles, historical average load profiles, format of the files, and other related information.

The load profiles will also be available on The Meter Data Management Agent (MDMA) server.

SCE has developed an Excel application that can assist an ESP to calculate the usage per hour for a load profiled customer. This application can be obtained from SCE by calling (626) 302-7613.

16.5 SCE Load Profiles and Corresponding Rate Schedules

SCE customers receive service on several dozen rate schedules. In order to analyze the loads of different types of customers, customers have been classified by rate schedules into 14 rate groups. The following table contains the mapping of customers to each of the 14 groups.

Customer Class (Rate Group)	Load Profile ID	Description	Rate Schedules
Domestic	Dom-S/M	Residential. Domestic Single and Multiple Family Dwellings	D, D-CARE, DE, DS, TOU-D-1, TOU-D-2, TOU-EV-1, TOU-EV-2
	Dom-MM	Residential. Domestic Master Metered	DM, DMS-1, DMS-2, DMS-3
Lighting, Small, and Medium Power	GS-1	Small Commercial. General Service, Non-demand Metered.	GS-1, TOU-GS-1, TOU-EV-3
(LSMP)	TC-1	Traffic Control	TC-1
	GS-2	Medium Commercial/Industrial. General Service, Demand Metered,	GS-2, GS-2-RTP, RTP-2-GS, RTP-3-GS, TOU-EV-4
	TOU-GS	Medium Commercial/Industrial. General Service, Time-of-Use	TOU-GS-2, TOU-GS-2-SOP
Agricultural and Pumping (AG&P)	PA-1	Small Agriculture & Pumping	PA-1
	PA-2	Agriculture & Pumping, Demand Metered	PA-2
	TOU-PA-5	Ag & Pump,Time-of-Use, TOU-PA- 5	TOU-PA-5
	Ag-TOU	Agriculture & Pumping, Time-of-Use	PA-RTP, TOU-PA, TOU-PA-3, TOU-PA-4, TOU-PA-6, TOU-PA-7, TOU-PA-SOP, TOU-PA-SOP-I
Large Power	TOU8-SEC	Large Power (> 500 kW) Secondary. General Service, Time-of-Use, Secondary Voltage (below 2 kv)	TOU-8-S, I-6-S, RTP-2-S, RTP-2-I-S, RTP-3-S, TOU-8-CR-1-S, TOU-8-RTP-S, TOU-8-SOP-S, TOU-SOP-I-S, TOU-8-SOP-RTP-S
	TOU8-PRI	Large Power (> 500 kW) Primary. General Service, Time-of-Use, Primary Voltage (2 kv-50 kv)	TOU-8-P, I-6-P, RTP-2-P, RTP-2-I-P, RTP-3-P, TOU-8-CR-1-P, TOU-8-RTP-P, TOU-8-SOP-P, TOU-SOP-I-P, TOU-8-SOP-RTP-P
Street Lighting	TOU8-SUB St_Ltng	Large Power (> 500 kW) Sub-Tran. General Service, Time-of-Use, Sub-Transmission Voltage (above 50 kv) Street and Area Lighting	TOU-8-T, I-6-T, RTP-2-T, RTP-2-I-T, RTP-3-T, TOU-8-CR-1-T, TOU-8-RTP-T, TOU-8-SOP-T, TOU-SOP-I-T, TOU-8-SOP-RTP-T AL-1, DWL, LS-1, LS-2, LS-3, OL-1

Southern California Edison Load Profiles and Corresponding Rate Schedules

16.6 Load Profiling and Distribution Loss Factors Protocols

Applicability

- 1. This protocol can be used by all ESPs to report hourly energy consumption for their end use customers in SCE's service area that do not have an hourly interval meter and are eligible for using load profiles to allocate cumulative meter usage into hourly intervals.
- 2. The purpose of this protocol is to convert non-hourly (monthly) usage recorded at the point of metering to hourly received energy at the UDC-ISO interconnection point for use in settlement with the ISO.
- 3. This protocol does not need to be used by ESPs for forecasting or customer billing. SCE's calculation of PX energy credits may differ from this protocol based on CPUC orders.

Conventions and Definitions

- 4. The time when a meter is read is defined as 11:59 p.m. of the day prior to when the meter is actually read.
- The Billing Cycle is defined to start at 12:00 a.m. on the day of the prior meter read, and to end at 11:59 p.m. of the day before the most recent meter read. Example: the billing cycle for a meter read on April 20 and May 20 starts at 12:00 a.m. on April 20 and ends at 11:59 p.m. on May 19.
- 6. Monthly Usage is defined as the difference between the most recent meter read and the previous meter read adjusted for any necessary corrections.
- 7. At least five decimal points of accuracy should be maintained in hourly energy calculations. Final reported hourly kWh values should maintain at least two decimal points of accuracy.

Data Sources

 SCE will provide the ESP with the customer's rate group (used to identify the appropriate load profile) and distribution loss factors category in the Customer Information Service Request, which is provided after a Direct Access Service Request is submitted. Note: SCE will send a new CISR whenever there is a qualifying change in status such as when a customer changes rate schedule. 9. SCE has posted static load profiles for the following 14 rate groups: Domestic, DMS, GS-1, GS-2, TOU-GS-2, PA-1, PA-2, AG-TOU, TOU-PA-5, TC-1, Street Lighting, TOU-8 Secondary, TOU-8 Primary, TOU-8 Subtransmission.

These static load profiles are available for downloading at the Internet address: http://www.sce-esp.com/eca/loadprofiling/static.htm (subject to change)

10. SCE will make dynamic load profiles available for Domestic, GS-1 and GS-2 rate schedules, beginning with data for May 18, 1998. Currently, SCE's goal is to have dynamic load profiles available within three working days after the transaction day. Once these dynamic load profiles are made available their use is mandatory and no party may use static load profiles for these rate schedules.

Dynamic load profiles are available at the Internet address:

http://www.sce-esp.com/eca/loadprofiling/dynamic.htm (subject to change)

- 11. Each rate group static load profile consists of 365 24-hour days. Static and dynamic load profile data for each hour represents the rate group's usage (average kW for the hour).
- 12. SCE will make Distribution Loss Factors available by hour and by customer voltage level. These loss factors will be based on a system load forecast and will be available one day prior to each transaction day.

Distribution Loss Factors will be available at the Internet address:

http://www.sce-esp.com/eca/dlf.htm (subject to change)

13. Where SCE is responsible for metering, SCE will maintain customer usage data, meter reads, and customer account number on a Meter Data Management Agent server for retrieval by ESPs.

Hourly Energy Calculation

- 14. Each ESP will need to maintain customer rate group and distribution loss factor category information for each of its customers.
- 15. Each customer's hourly usage (meter level) is computed using cumulative energy usage over the billing cycle from the MDMA server and hourly load profile information for the billing cycle, as extracted from the applicable sources identified in items 8, 9 and 12 above. The steps are as described in items 15 and 16 below.
- 16. ESPs will calculate the load profile as a fraction from the load profiling data posted on the Internet.
 - Sum the hourly load profile kW values for all days of the billing cycle, for the customer load profile rate group.
 - Divide each hour load profile kW value by the sum derived above, to compute the hourly fraction of usage.

• Customer's hourly usage in each hour is the billing cycle usage times hourly fraction calculated above.

Example: Meter read on April 20 and May 20, usage 600 kWh. Customer's load profile rate group is residential. The sum of the hourly load profile kW for April 20 through May 19 is 417.331. The first 28 days are from the static load profile, the last two days are from the dynamic load profile. Hour 1 of April 20 load profile kW is 0.405 kW. The hourly fraction of usage for hour 1 of April 20 is 0.405/417.331=0.000970. Then the hourly usage for this customer in hour 1 of April 20, is equal to 600*0.000970= 0.582272 kWh.

- 17. For customers with Time-Of-Use meters, that is meters which record usage by on-peak, mid-peak, off-peak periods, load profiling should be performed separately with the data for each TOU period.
 - Sum the hourly load profile kW values for all days in the billing cycle to create separate totals for each TOU period for the customer load profile rate group.
 - Divide each hour load profile kW value by the sum derived above, to compute the hourly fraction of usage for each TOU period.
 - Customer's hourly usage in each hour of the TOU period is the billing cycle usage for each TOU period times hourly fraction calculated above.

For example, meter read on April 20 and May 20, customer rate group TOU-GS-2, customer's mid-peak period usage is 10,000 kWh.

The sum of the hourly kW for the mid-peak period of April 20 through May 19 is 18,412.090. The hourly fraction of mid-peak usage for hour 9 of April 20 is 48.946/18,412.090=0.002658. Then the hourly usage for this customer in hour 8 of April 20, is equal to 10,000 kWh *0.002658= 26.58 kWh.

18. The hourly usage (for ISO reporting) will be calculated by multiplying the hourly usage (meter level) by the appropriate distribution loss factor.

Example: For the example in 16 above, customer's distribution loss factor category is secondary. For hour 1 of April 20 the distribution loss factor is 0.054533. The hourly usage reported to ISO is then equal to

0.582272 kWh (1+0.054533) = 0.614025 kWh.

From SDG&E's Manual

(San Diego Gas & Electric's Forms goes here)

ESP Service Agreement Letter Package ESP Information Form ESP Credit Information Direct Access Service Request (DASR) Termination of Direct Access Historical Energy Usage Information Release Form Non-Confidential Customer Information Database Release Order Form Meter Data and Communications Request (MDCR) Service Order Completion Form EDI Letter of intent to Exchange Data Utilizing EDI ESP Trading Partner Information

From PG&E's Manual

CUSTOMER INFORMATION RELEASES

This chapter was last updated on: 2/12/98

Overview

This chapter provides information on how ESPs participating in DA with PG&E can obtain certain types of customer information.

Non-Confidential Database (NCDB) Information

ESPs have the opportunity to purchase non-confidential customer information that includes basic energy information. ESPs can request order forms by contacting the ESP Relations hotline number at 415-973-1666 or by contacting a specific ESP Relations Account Manager (see the "DA Contacts" link within the *ESP Resource Center* website for names and numbers). Customer consent for release of the information is not a requirement as because the data is comprised of aggregated, non-confidential information and does not disclose details about specific customers. Customer information will be provided to the ESP's in a CD-ROM format on a one time basis at a cost of \$1,200.00 per set. The table below describes the type of information which will provided.

RESIDENTIAL	COMMERCIAL	
ZIP CODE	• ZIP CODE (FIRST 3 DIGITS)	
RATE CATEGORY	RATE CATEGORY	
METER READ DATE	METER READ DATE	
MONTHLY USAGE	MONTHLY USAGE	
TOU USAGE (IF APPLICABLE)	• TOU SPLIT, DEMAND & ENERGY (IF APPL)	
12 BILLING TRANSACTIONS	• 12 BILLING TRANSACTIONS	

RES	DEN	ΙΤΙΑΙ	

COMMERCIAL

• SIC IDENTIFIER (2 DIGITS)

* Note: Load research sample data will not be included in the release of NCDB information. Data on both residential and commercial accounts with monthly usage below 500 kWh will be included in the information release. The data is organized by zip code and by Standard Industrial Code (SIC) code, for commercial customers. Information for a particular zip code and SIC code will only be included in the database if there are at least 15 customer accounts within the grouping or the grouping accounts for at least 15% of the aggregate load amount for all customers. In the event that an end-use customer's anonymity cannot be ensured, PG&E that customer's information will be dropped from the database.

ESPs with questions regarding the NCDB information release or request status inquiries should call the ESP Relations hotline at 415-973-1666 or a specific ESP Account Manager (see the "DA Contacts" link within the *ESP Resource Center* website for names and numbers).

Confidential Customer Information Release

ESPs have the opportunity to request customer specific information that includes energy usage for the last 12 billing transactions.. To request this information, the ESP should contact ESP Relations hotline at 415-973-1666 or a specific ESP Account Manager (see the "DA Contacts" link on the *ESP Resource Center* website for names and numbers).

In order to request information for a customer, the ESP will be required to obtain and provide ESP Relations with a signed *Customer Information Release* form and indicate the specific customer account number(s). The form can be obtained from the "DA Documents" link on the *ESP Resource Center* website.

The following data will be provided in the customer information release:

ACCOUNT NUMBER	METER NUMBER	
CUSTOMER NAME	METER READ DATE (CURRENT/PRIOR)	
SERVICE ADDRESS	BILLING CYCLE DAYS	
BILLING ADDRESS	TOU SPLIT (DEMAND & ENERGY)	
• SIC 2	TOTAL REVENUE FOR LAST 12 BILLING PERIODS	
RATE SCHEDULE	TOTAL KWH FOR LAST 12 BILLING PERIODS	

* *Note: Load research sample data will not be included in the release of customer information.* PG&E will forward the information described above within 10 working days of its receipt of the ESP's request. PG&E will provide DA customer data free of charge for up to two times a year. However, a charge of \$40.00 per data set will apply to subsequent requests. Data format options include hard copy report, floppy disk or e-mail file.

ESPs with questions regarding the NCDB information release or request status inquiries should contact the ESP Relations hotline at 415-973-1666 or a specific ESP Relations Account Manager (see the "DA Contacts" link on *the ESP Resource Center* website for names and numbers).