MDMA Approval Checklist

MDMA Services Applied For: (check all that apply)
- ☐ Interval Data Services (Hourly)
- ☐ Cumulative Data Services (Monthly)
- ☐ Interval Data Services (15 minute) – EDI

- Each MDMA shall be required to submit a written application to the UDC with which it is request MDMA approval.
- Each MDMA applicant with an executed ESP agreement with the UDC which it is requesting MDMA approval, will receive priority.
- This MDMA approval will be granted to MDMA agents that possess the ability to perform these functions as outlined by the three UDCs in the December MDMA Workshops.
- The approval is based on the review of the written application, completed documents and a Data Management Acceptance Test.
- Upon request from the MDMA applicant and submission of application, the UDC will electronically forward a copy of the Data Management Acceptance Test.

- **The written application shall include:**
  - A completed written application, including the name and address of the MDMA.
  - A completed approval checklist
  - A description of the MDMA applicant's experience in meter reading and meter data management.
  - **Meter Reading Training Program/Manuals, including but not limited to the following:**
    (Check all that apply)

☐ Safety	☐ Meter Reader Work Practices & Job Description
☐ Security	☐ Meter Reading Training Guide (e.g., Meter Pro License)
☐ Hand held device training manual	☐ Uniform & equipment
☐ Performance Responsibilities	☐ Vehicle Insurance
☐ Customer Relations	☐ Additional documentation and/or manuals to meter reading
☐ Hiring Practices & Criteria	☐ Subcontractor list, if applicable

  - **Meter Data Management Agent Training Curriculum and Operational Procedures, including but not limited to the following:** (Check all that apply) If the required information identified in the Acceptance package is not included in the documents listed below, please include the document or describe how the requirement is being met.

☐ Hiring Practices	☐ Position Descriptions
☐ Training Curriculum	☐ Operational Procedures (Sample)
☐ Disaster Recovery	☐ Position Descriptions
☐ Operations/System Description	

  - **Successful completion of the Data Management Acceptance Test will include, but not be limited to the following:**
    - ⇒ Input and output data will be matched to the test questions using the MEPMD01 field "Receiver customer ID" with the following format: MDMATESTnn where nn=test question number
    - ⇒ VEE data must be produced through automated means that provide a systematic and consistent set of results.
    - ⇒ If data are manipulated manually, the MDMA must document the procedures that it has implemented to insure consistency.

Manual Meter Reading Qualification Requirements Checklist

as developed by SCE, SDG&E, and PG&E at San Francisco, California on
January 20, 1998

Applicants must contact the appropriate UDC to consider any deviation
from the following requirements.

Section I.   **Please provide a brief description for items 1-5.**

1.0. Capability
- ☐ 1.1.   Experience in providing meter reading services and current capability

2.0. Initial Meter Reader Applicant Screening
- ☐ 2.1.   Education requirements

- ☐ 2.2.   Security screening

- ☐ 2.3.   Drug screening

- ☐ 2.4.   Photo I.D. required

- ☐ 2.5.   Proof of valid driver's licenses

3.0. Job Training Requirements
- ☐ 3.1.   Combination classroom and field training – minimum of 10 days

- ☐ 3.2.   Meter Pro training (or other "how to read" training programs) and testing

- ☐ 3.3.   Hand-held device training

- ☐ 3.4.   Equal Employment Opportunity Information

4.0. Safety Training
- ☐ 4.1.   Cal OSHA Title 8 General Safety Orders

- ☐ 4.2.   Safety policy

- ☐ 4.3.   Accident reporting

- ☐ 4.4   Defensive driving

- ☐ 4.5.   Hazardous material communication

- ☐ 4.6.   Environmental safety/ergonomics

- ☐ 4.7.   Dog bite prevention

Manual Meter Reading Requirements Checklist (continued)

5.0 Meter Reader Work Policies
- ☐ 5.1. Standards of conduct

- ☐ 5.2. Identification of hazardous conditions (i.e., wires down)

- ☐ 5.3. Company uniform/identification card

- ☐ 5.4 Customer key security

- ☐ 5.5 Insurance requirements (personal vehicle insurance if non-company vehicle)

Section II. Please provide copies of <u>all</u> lesson outlines, training manuals, and learning aids (lists of videos, brochures, etc.)

1.0. Lesson outlines for all job and safety training

2.0. Training manuals for all job and safety training
- ☐ 2.1. Hand-held Training Manual

- ☐ 2.2. Energy Diversion Program

- ☐ 2.3. Meter Reading Training Manual

- ☐ 2.4. Accident Prevention Manual

3.0 Learning aids
- ☐ 3.1. Customer communications

Section III. Please provide the following details and documentation regarding sub-contractors employed to perform MDMA services

1.0 MDMA Sub-contractors

- ☐ 1.1. Sub-contractor list

- ☐ 1.2. Sub-contractor documentation – training, safety, policies, and procedures

- ☐ 1.3. Sub-contractor Memorandum of Understanding

- ☐ 1.4. Sub-contractor back-up operational procedures

Telephonic & Automated Meter Reading Requirements Checklist

Section I. **Please provide a description and/or documentation of telephonic and automated meter reading capabilities, including the methods used to identify possible theft.**

1.0. Telephonic and Automated Meter Reading (AMR)
- ❒ 1.1. Compliance to state, local, federal laws

- ❒ 1.2. Telephone lines – customer has first priority

- ❒ 1.3. Tampering/energy diversion identification methods (tilt, reverse rotation, and power activation alarms)

- ❒ 1.4. Orphaned meter alarms

- ❒ 1.5. Control documentation

MDMA Server
Qualification Requirements Checklist

SCE, SDG&E, and PG&E continue to work to standardize these requirements.

1.0   Capability

❐ 1.1.   Experience of Meter Data Management

❐ 1.2.   Overview of System Design

❐ 1.3.   Validating, Estimating, and Editing

❐ 1.4.   Protection (Security) of Data

❐ 1.5.   Archiving Data (3 yrs) and Data Recovery

❐ 1.6.   Technical Support Desk and 24 hour availability

❐ 1.7.   System Availability

❐ 1.8.   Security of System

2.0   Disaster Recovery Plan (See Section 13)

3.0   Education and Hiring Process

❐ 3.1.   Hiring Practices

   ❐ 3.1.1.   Education Requirements
   ❐ 3.1.2.   Screening Process
   ❐ 3.1.3.   Required competencies
   ❐ 3.1.4.   Experience
   ❐ 3.1.5.   Demonstrated skill operating required software
   ❐ 3.1.6.   Programming skills, if applicable
   ❐ 3.1.7.   Hardware support skills, if applicable
   ❐ 3.1.8.   Typing, oral, written, or other communication requirements

❐ 3.2.   Training Practices

   ❐ 3.2.1.   Safety
   ❐ 3.2.2.   Interpersonal relations with internal and external customers
   ❐ 3.2.3.   Overview of MDMA requirements

MDMA Server Qualification Requirements Checklist (continued)

❒ 3.3. Copies of Training Manuals

   ❒ 3.3.1.   Written procedures for each major group of tasks written at the level for new hire to use after on the job demonstration

   ❒ 3.3.2.   Daily operations procedures (ex: system function checks, polling cycle reviews, troubleshooting, file imports and exports, VEE, etc.)

   ❒ 3.3.3.   Weekly processes to ensure productivity, performance, and data quality

4.0 Education and Hiring Process

❒ 4.1. System availability and Security of System