

# Meter Data Error Requested Billing Adjustment (RBA) Process Changes Effective June 1, 2007

Web Conference  
July 19, 2007

# Before We Begin

- Turn off your pop-up blocker.
- Today's presentation can be found on the ISO Web at [Home > Support > Training > Course Materials > Meter Data Error Requested Billing Adjustment Process.](#)
- Presenters
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# Objective

- To explain the new Meter Data Error Requested Billing Adjustment (RBA) process effective June 1, 2007, per Market Rule 1, Sections III.3.6 and III.3.7, and Section 6 of the ISO New England Billing Policy.

# Topics We Will Cover

- Eligibility Requirements
- RBA Submission
- Submission Deadlines for a Meter Data Error RBA
- Market Information Server (MIS) Reports
- Final Settlement Administration

# Topics We Will Not Cover

- Metering Upload/Download File Formats:
  - [Upload/Download File Formats](#)
- Billing Details for Settlements using Meter Data:
  - [Bill Job Aids and Additional Invoice Details](#)
- Other non-meter data error RBAs, status and dollar amounts for both current and previous Participant Billing Disputes:
  - [Billing Disputes 2007](#)

# Eligibility Requirements

## Market Rule 1

# Eligibility Requirements

- Market Rule 1, under Section III.3.7.6:
  1. Meter Data Error identified and communicated prior to or by the Correction Limit based upon affected asset type  
*“the Meter Data Error at issue was identified by the asset owner, Assigned Meter Reader or the Host Participant Assigned Meter Reader and communicated to the Host Participant Assigned Meter Reader no later than twenty-five (25) days prior to the Correction Limit for Directly Metered Assets and by the Correction Limit for Profiled Load Assets and could not be resolved prior to those deadlines”*

**Correction Limit:** The date that is ninety (90) calendar days from the date of initial billing of the last Operating Day of the month to which the data applied for Market Participant supplied meter data.

**NOTE:** The definition of Correction Limit will change based upon the implementation of the meter data enhancements scheduled Fall 2007 pending Participant Committee vote and FERC filing.

[Home > Committees > Committees and Working Groups > Markets Committee and Working Groups > Markets Committee > Materials > June 12-13, 2007 > AO MC Mtg Materials.](#)

# Eligibility Requirements (cont.)

- Market Rule 1, under Section III.3.7.6:
  2. Meter Data Error  $\geq$  1,000 MWH per asset for a calendar month and reported to the ISO by the Meter Data Error RBA Submission Limit  
*“the Meter Data Error at issue was identified by the asset owner, Assigned Meter Reader or Host Participant Assigned Meter Reader and reported to the ISO by the Meter Data Error RBA Submission Limit, and such Meter Data Error represents an error that is equal to or greater than the 1,000 MWH per Asset over a calendar month”*

Meter Data Error RBA Submission Limit: the date thirty (30) calendar days after the issuance of the Invoice containing the results of the data reconciliation process

# Requested Billing Adjustment Submission

## ISO Billing Policy

# RBA Submission

- ISO Billing Policy, under Section 6.3.1 non-meter data error process, a Disputing Party:
  - Submits an RBA in writing to the Chief Financial Officer of the ISO
  - Submits RBA within three months of the date that the Invoice or Remittance Advice containing the disputed amount was issued by the ISO

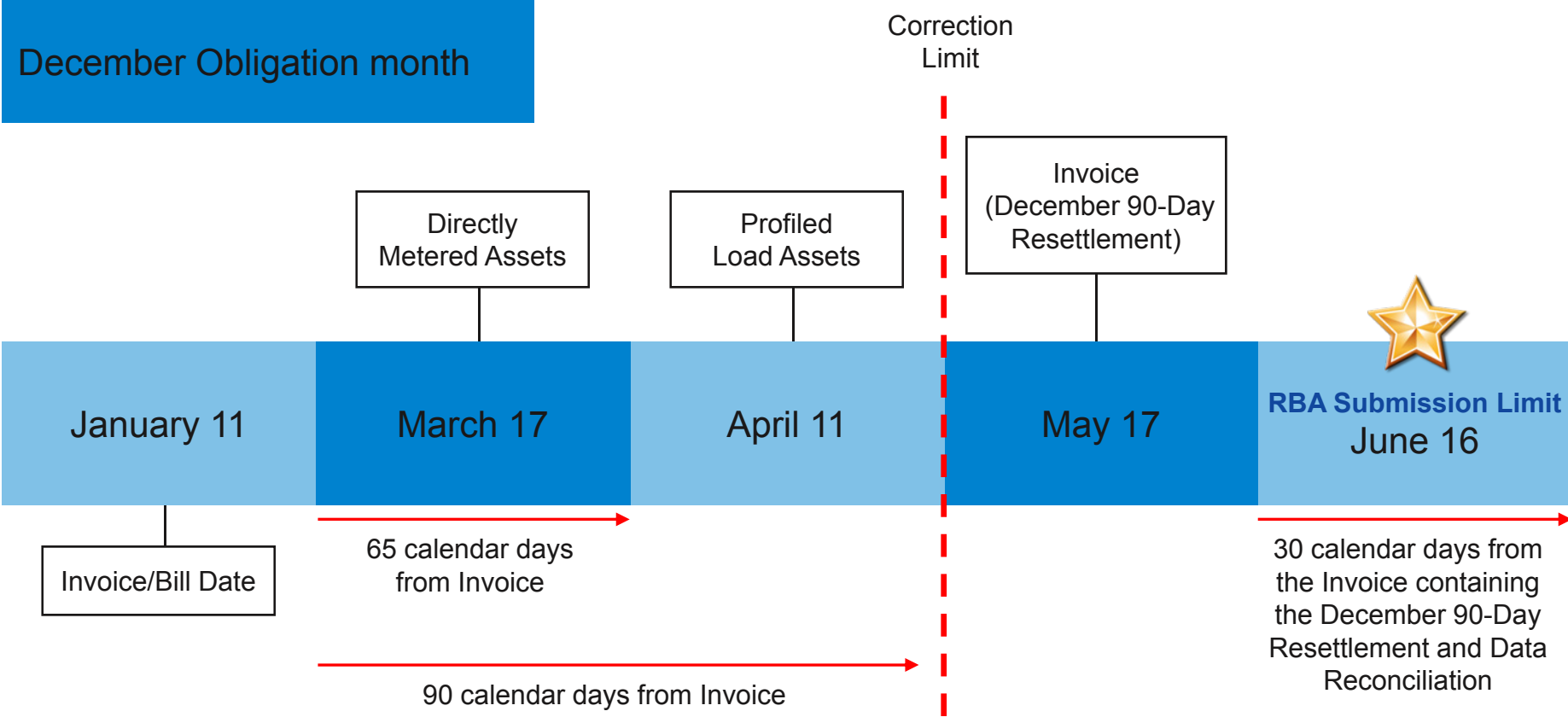
**No change in current RBA process**

# RBA Submission (cont.)

- ISO Billing Policy, under Section 6.3.1 New Meter Data Error process, a Disputing Party:
  - Submits an RBA in writing to the Chief Financial Officer of the ISO
  - Submits RBA for a Meter Data Error no later than the Meter Data Error RBA Submission Limit through the use of the [RBA form for Meter Errors](#) as posted on the ISO Web site

# Eligibility Requirements Timeline Example

Meter Data Error Identification, Communication, and RBA Submission



# **Submission Deadlines for a Meter Data Error Requested Billing Adjustment ISO Billing Policy**

# Corrected Meter Data Submission Deadlines

- Corrected Directly Metered Asset Data
  - Prior to the 45th calendar day after the Meter Data Error RBA Submission Limit, the Host Participant Assigned Meter Reader or Assigned Meter Reader is responsible for the submission of this data, **or** a notice that no correction is necessary, to the ISO.

*For a Directly Metered Asset affecting multiple metering domains, all affected Host Participant Assigned Meter Readers or Assigned Meter Readers must notify the ISO prior to the usage of the data in the final settlement calculations.*

*The Host Participant Assigned Meter Reader for the Directly Metered Asset is responsible for initiating an e-mail to every affected party in order to obtain the necessary acceptance and coordinate its delivery to the ISO.*

**NOTE:** The above corrected meter data submission deadline will change based upon the implementation of the meter data enhancements scheduled Fall 2007 pending Participant Committee vote and FERC filing.  
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# Corrected Meter Data Submission Deadlines (cont.)

- Corrected Metered Data for Profiled Load Assets and ICAP Tags
  - Prior to the 81st calendar day after the Meter Data Error RBA Submission Limit, the Host Participant Assigned Meter Reader is responsible for the submission of this data, or a notice that no correction is necessary, to the ISO.
- Corrected Internal Bilateral Transactions (IBTs)
  - Prior to the 91st calendar day after the Meter Data Error RBA Submission Limit, the Market Participant is responsible for the submission of this data to the ISO.

**NOTE:** The above corrected meter data submission deadlines will change based upon the implementation of the meter data enhancements scheduled Fall 2007 pending Participant Committee vote and FERC filing. [Home > Committees > Committees and Working Groups > Markets Committee and Working Groups > Markets Committee > Materials > June 12-13, 2007 > AO MC Mtg Materials.](#)

***Corrected data received after the above mentioned deadlines will not be considered in connection with any RBA for a Meter Data Error.***

# Market Information Server (MIS) Reports

# MIS Reporting

- Reports for affected Metering Domain(s) for which the Host Participant Assigned Meter Reader is responsible
  - Directly Metered Asset Data **SP\_RTDOMAIN**
    - Made available by the ISO on the 45th Day
    - Contains the latest directly metered data submitted to the ISO prior to Day 45
  - Profiled Load Asset Data **SP\_RTPROFILELOAD**
    - Made available by the ISO on the 81st Day
    - Contains the latest profiled load asset data submitted to the ISO prior to Day 81

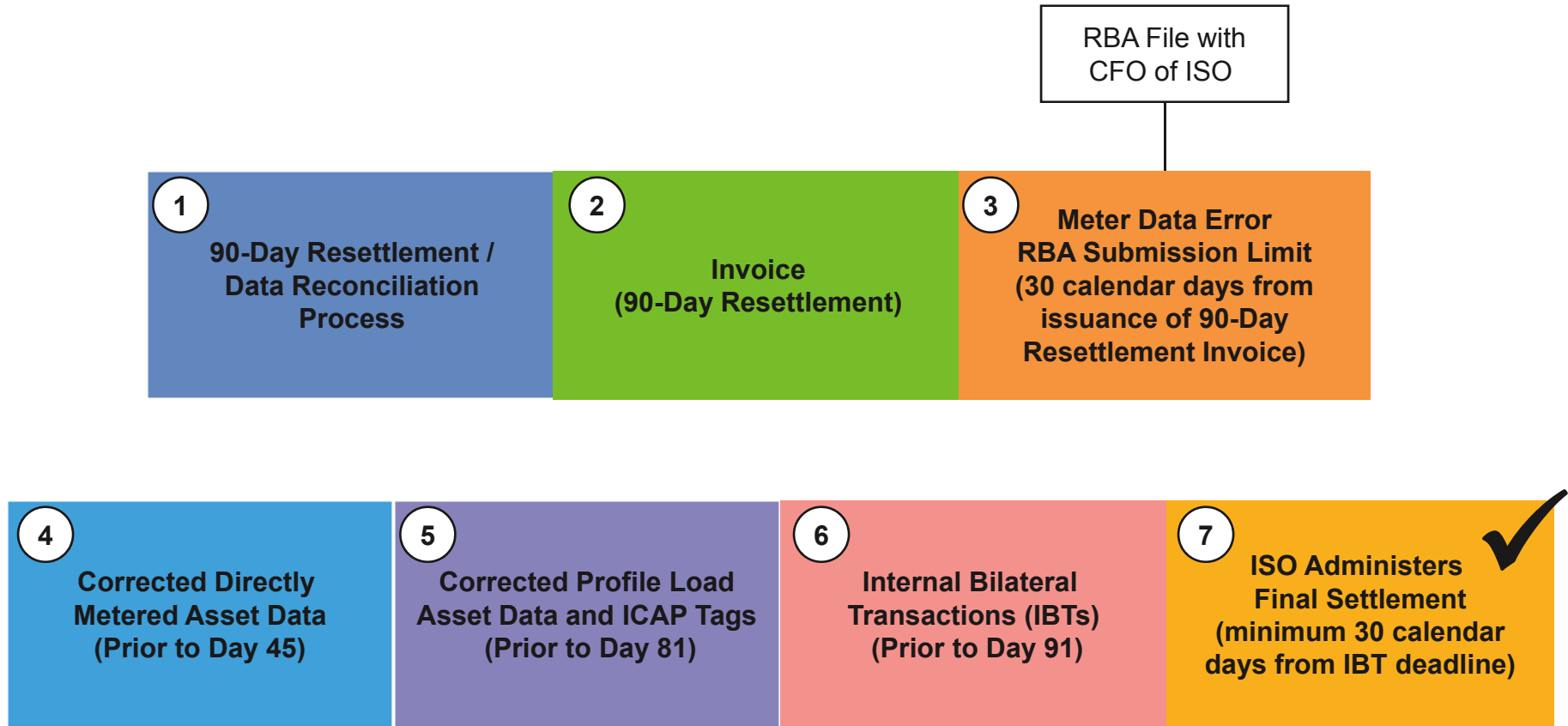
*The above named reports will also be made available by the ISO, upon request, for any interim corrected directly metered data and/or preliminary profiled load asset data for which the Host Participant Assigned Meter Reader is responsible.*

# Final Settlement Administration

# Final Settlement

- Upon receipt of the corrected meter data the ISO will have a minimum of 30 calendar days to administer the final settlement.
  - Elapsed calendar days from the receipt of Internal Bilateral Transactions
  - Based upon the latest data provided to ISO by corrected meter data submission deadlines
- Results of the final settlement will be included in the next Invoice containing non-hourly charges.
- ISO will provide to the Chair of the NEPOOL Budget and Finance Subcommittee written notification that the final settlement has been administered.

# Timeline for Meter Data Error Requested Billing Adjustment (RBA) Process



# Additional Information

- Notice of RBA
  - Prepared and submitted by the ISO within 3 business days of the receipt of the Meter Data Error RBA by the ISO's CFO
  - Identifies a specific representative of the ISO to whom all communications regarding the Requested Billing Adjustment be sent
  - Indicates the affected metering domains and the affected Host Participant Assigned Meter Readers
- Process Completion for a RBA for a Meter Data Error
  - Administering the final settlement based on the corrected meter data completes the process
  - Under the ISO Billing Policy, Sections 6.3.4 through 6.5 including, but not limited to, the comment period and "RBA Decision" are not applicable to an RBA for a Meter Data Error

# References

- ISO New England Web site
  - RBA Form for Meter Errors
  - Transmission, Markets & Service Tariff
    - ISO Billing Policy, (Section I)
    - Market Rule 1, (Section III)
  - Home > Committees > Committees and Working Groups > Markets Committee and Working Groups > Markets Committee > Materials > June 12-13, 2007 > AO MC Mtg Materials
  - MIS Report Description Document
- Customer Services
  - Phone: 413-540-4220
  - E-mail: [custserv@iso-ne.com](mailto:custserv@iso-ne.com)



# Questions



# Evaluations

will be e-mailed to all registrants  
for this session

Thank you for taking part in today's session.

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