Advanced Metering Infrastructure (AMI)
Program Policies Overview

Public Utility Board
Reports of the Director
May 13th, 2020
1. Policies, Procedures, & Practices
2. Framework of Policy Packages
   • Package 1 – Spring 2020
   • Package 2 – Fall 2020
   • Package 3 – Fall 2022
3. Timeline
4. Policy Impacts & Process Review
5. Proposed Policies
**Policies, Procedures, & Practices**

**Policies**
Principles that guide actions to achieve desired outcomes.

**Procedures**
Detailed, written, step-by-step instructions to achieve uniformity in a specified task.

**Practices**
How a task is achieved day-to-day, with or without written procedures.

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**High Level**
- Board & Executive Leadership
- Business Unit
### Framework of Policy Packages

<table>
<thead>
<tr>
<th>Package 1</th>
<th>Package 2</th>
<th>Package 3</th>
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<tr>
<td><strong>Spring 2020</strong>&lt;br&gt;Prior to Initial Meter Deployment Area &amp; Testing</td>
<td><strong>Fall 2020</strong>&lt;br&gt;Prior to Mass Meter Deployment</td>
<td><strong>Fall 2022</strong>&lt;br&gt;Following Mass Meter Deployment</td>
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<tr>
<td>AMI Essential Policy Changes – Initial Deployment Area Required&lt;br&gt;TMC changes anticipated to be effective 9/1/2020</td>
<td>AMI Essential Policy Changes – Mass Deployment Required&lt;br&gt;TMC changes anticipated to be effective 1/1/2021</td>
<td>AMI Policy Refinements &amp; Potential Fee/Rate Changes&lt;br&gt;TMC changes anticipated to be effective 1/1/2023</td>
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<tr>
<td>Non-AMI, Essential Policy Changes</td>
<td>Non-AMI, Non-Essential Policy Changes (where applicable)</td>
<td>TPU Policy Standardization &amp; Formatting</td>
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Timeline

- System Integration & Testing
  - Initial Meter Deployment Area & Testing
  - Mass Meter Deployment
- Communication Network Deployment
- Communications & Training

Q3 2019
Q4 2019
Q3 2020
Q4 2020
Q3 2022
## Upcoming Target Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Meeting Type</th>
<th>Discussion Topics</th>
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<tr>
<td>May 13&lt;sup&gt;th&lt;/sup&gt; PUB Meeting</td>
<td>Policies Overview</td>
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</table>
| May 27<sup>th</sup> PUB Meeting | Detailed Policies Discussion | - Opt-Out Review and Fee Recommendation  
- Advanced Meter Customer Side Repairs |
| June 10<sup>th</sup> PUB Meeting | Detailed Policies Discussion | - PrePay Overview                                                              |
| June 24<sup>th</sup> PUB Meeting | Adoption of Package 1 Policies |                                                                                   |
| July 21<sup>st</sup> & July 28<sup>th</sup> City Council | City Council Adoption | - Adoption of Package 1 TMC Changes  
- First and Second Council Readings |
Policy Impacts & Process Review

Dec. 2019 ← → Mar. 2020

AMI Program identifies required policy changes

- AMI Program reviewed AMI Business Process Documents (BPD’s) and identified policy impacts
- Reviewed, researched, and made recommendations and comments for:
  - Division Policies
  - Tacoma Municipal Code (TMC)
  - TPU Customer Privacy Policy
  - Customer Side Repair Policy

Operating Divisions review identified policy changes and provide feedback, providing preferred new policy language where able

- Operating Division subject matter experts reviewed AMI Program comments/suggestions
- Provided language changes
- Identified which AMI Policy Package updates should be included in
- Provided non-AMI policy changes

AMI Program coordinates drafting of policy language

- AMI Program compiled all recommendations and language changes for each policy
- Created clean policy documents with all recommended policy updates
- Identified which AMI Policy Package each update will be proposed in and coordinated legal reviews
1. **Customer Services** Customer Service Policy
2. **Water** Customer Service Policy
3. **Power** Customer Service Policy
4. **Tacoma Municipal Code (TMC), Ch. 12 – Utilities**
5. **TPU** Customer Privacy Policy
6. *Advanced Meter* Customer Side Repairs
7. **Tacoma Power** Staff Procedure A-7
1. **Customer Services** Customer Service Policy
   a. AMI Opt-Out Policy Language
   b. PrePay Program Policy Language
   c. Non-AMI Updates
2. **Water** Customer Service Policy
   a. Virtual Disconnect/Reconnect Definition
   b. Clarification of Customer Owned Pipe and Utility Owned Asset
   c. Non-AMI Updates
3. **Power** Customer Service Policy
   a. Non-AMI Updates
4. **Tacoma Municipal Code (TMC), Ch. 12 – Utilities**
   a. Electric Daily Demand Reset (changed from monthly)
   b. Unauthorized Usage Clarification for Water Virtual Disconnect/Reconnect
   c. Non-AMI, National Electric Code (NEC) 2020 Updates
5. **TPU** Customer Privacy Policy
6. **Advanced Meter** Customer Side Repairs
7. **Tacoma Power** Staff Procedure A-7
   a. Allow for separately metered residential, domestic use, garages to be eligible for the Residential Service electric rate.
1. **Tacoma Municipal Code (TMC), Ch. 12 – Utilities**
   a. AMI Opt-Out Fee
   b. PrePay Rate
   c. AMI Electric Meter Disconnect/Reconnect Fees (pending review)

2. **Customer Services** Customer Service Policy
   a. Non-AMI Updates

3. **Water** Customer Service Policy
   a. Non-AMI Updates

4. **Power** Customer Service Policy
   a. Non-AMI Updates
1. **Tacoma Municipal Code (TMC),** Ch. 12 – Utilities
   a. Comprehensive Review of Fees and Charges Related to New AMI Services

2. **Water** Customer Service Policy
   a. Leak Adjustment Policy Changes (pending review)

3. **General Customer Service Policy** Standardization & Formatting
Non-AMI Example Policy Updates, include:

**Customer Services**
- a. Adding language that billing schedules are available to all, in addition to meter reading schedules.
- b. Clarifying that a “written” request is needed to transfer a credit balance to other non-utility City accounts.
- c. Clarification of the billing dispute informal conference process and specifying timelines of ten (10) calendar days each for customers to request and complete a “Statement of Disputed Bill Form”.

**Power**
- a. Adding examples of an underground point of service for varying electrical configurations.
- b. Clarifying responsibilities for notification of load additions.

**Water**
- a. Adding a definition for Critical Medical Condition and revising Kidney Dialysis Treatment sections to state Critical Medical Condition.
- b. Clarifying that the standard for residential domestic service is a 3/4” service with a 5/8” meter.