



Advanced Metering Infrastructure (AMI) Program Policies Overview

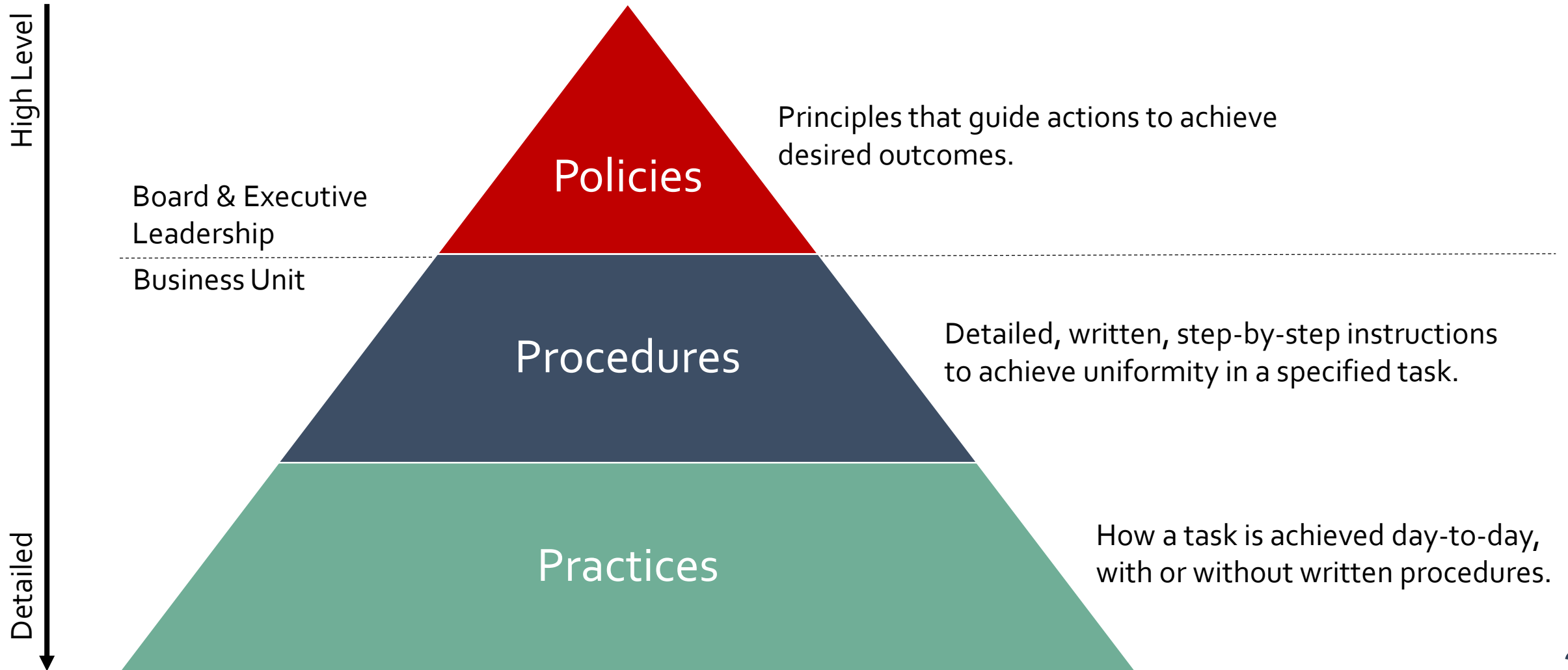
Public Utility Board
Reports of the Director
May 13th, 2020



●●● Agenda

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

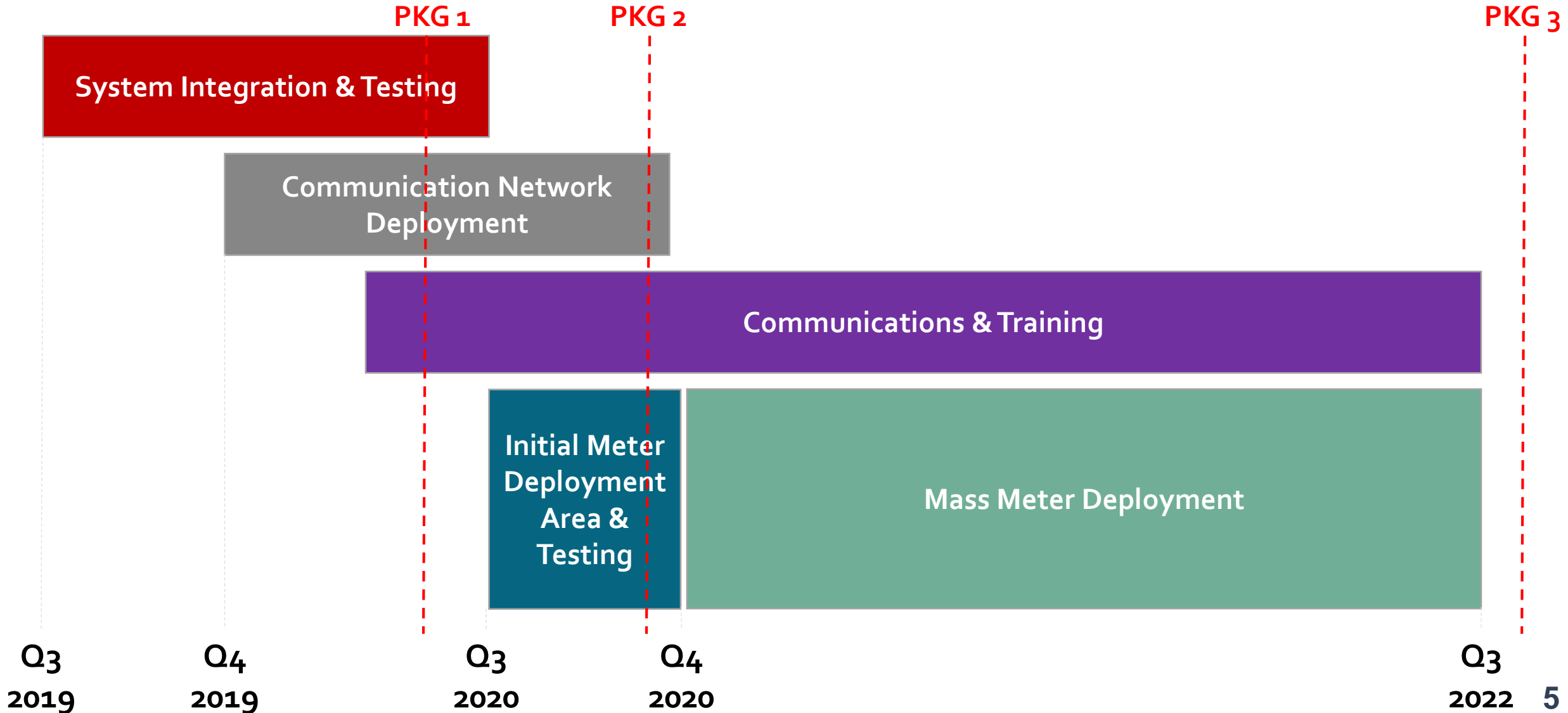
●●● Policies, Procedures, & Practices



Framework of Policy Packages

Package 1 Spring 2020 → Prior to Initial Meter Deployment Area & Testing	Package 2 Fall 2020 → Prior to Mass Meter Deployment	Package 3 Fall 2022 → Following Mass Meter Deployment
AMI Essential Policy Changes – Initial Deployment Area Required TMC changes anticipated to be effective 9/1/2020	AMI Essential Policy Changes – Mass Deployment Required TMC changes anticipated to be effective 1/1/2021	AMI Policy Refinements & Potential Fee/Rate Changes TMC changes anticipated to be effective 1/1/2023
Non-AMI, Essential Policy Changes	Non-AMI, Non-Essential Policy Changes (where applicable)	TPU Policy Standardization & Formatting
Non-AMI, Non-Essential Policy Changes (where applicable)		

Timeline



Upcoming Target Dates

May 13th PUB Meeting

Policies Overview

May 27th PUB Meeting

Detailed Policies Discussion

- Opt-Out Review and Fee Recommendation
- Advanced Meter Customer Side Repairs

June 10th PUB Meeting

Detailed Policies Discussion

- PrePay Overview

June 24th PUB Meeting

Adoption of Package 1 Policies

July 21st & July 28th City Council

City Council Adoption

- Adoption of Package 1 TMC Changes
- First and Second Council Readings

Policy Impacts & Process Review

Draft Policy Discussion

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

●●● Package 1 Policies

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

Package 1 Policies - Summary

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.

Package 2 Policies - Summary

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

Package 3 Policies - Summary

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**

Example Changes: Customer Service Policies



Draft Policy Discussion

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.