

# RULES AND REGULATIONS

## Title 52—PUBLIC UTILITIES

PENNSYLVANIA PUBLIC UTILITY COMMISSION

[52 PA. CODE CH. 57]

[L-970128]

### Advanced Meter Deployment for Electricity Providers

The Pennsylvania Public Utility Commission (Commission) on October 16, 1998, adopted a revised final rulemaking under section 7(c) of the Regulatory Review Act (71 P. S. § 745.7(c)). This revised final rulemaking is to establish uniform procedures, standards and customer education strategies for the deployment and customer selection of a qualified advanced meter or coordination with an electric distribution company installation of a qualified advanced meter network while maintaining system safety and reliability in this Commonwealth. The contact persons are Charles Covage, Bureau of Conservation, Economics and Energy Planning (717) 783-3835 and Stephen Gorka, Law Bureau, (717) 772-8840.

Public Meeting held  
October 16, 1998

*Commissioners Present:* John M. Quain, Chairperson; Robert K. Bloom, Vice Chairperson; David W. Rolka; Nora Mead Brownell and Aaron Wilson, Jr.

#### Revised Final Rulemaking

*By the Commission:*

##### *Introduction*

On June 8, 1998, both the Senate Consumer Protection and Professional Licensure Committee and the House Consumer Affairs Committee voted to disapprove the final regulations at this docket. On June 18, 1998, IRRC disapproved these final regulations. On September 21, 1998, the Commission received formal notice from IRRC as to the disapproval of the regulations. On September 24, 1998, the Commission provided the Governor, the Senate Consumer Protection and Professional Licensure Committee, the House Consumer Affairs Committee and IRRC with formal notification under section 7(a)(2) of the Regulatory Review Act, of the agency's intention to proceed further with a modified version of the regulation in accordance with section 7(c) of the Regulatory Review Act.

##### *History of Proceeding*

On December 3, 1996, Governor Tom Ridge signed into law the Electricity Generation Customer Choice and Competition Act (act). The act revised 66 Pa.C.S. (relating to Public Utility Code), by inter alia, adding 66 Pa.C.S. Chapter 28, relating to restructuring of the electric utility industry. 66 Pa.C.S. §§ 2801—2812.

The purpose of the act is to provide for an orderly transition of the electric industry of this Commonwealth from a vertically integrated monopoly to a structure which would support the development of a competitive retail generation market. The ultimate goal is to permit retail electric customers (customers) in this Commonwealth to have direct access to a competitive generation market while simultaneously enjoying continued reliable and safe electric service.

In response to this Legislative mandate, on March 10, 1997, the Commission instituted a rulemaking proceeding to develop regulations which establish uniform procedures, standards and education strategies for the deployment and customer selection of a qualified advanced meter or coordination with an EDC for the installation of a qualified advanced meter network while maintaining system safety and reliability in this Commonwealth. The Commission believes that this structure will facilitate the marketing and deployment of advanced meters.

By order entered April 25, 1997 at Docket M-00960890F0009, the Commission requested comments concerning certain outlined metering questions. The order was distributed to all jurisdictional EDCs, the Office of Consumer Advocate (OCA), Office of Small Business Advocate and Electric Competition Legislative Stakeholders with a 30-day comment period.

Based upon comments received, the Commission promulgated proposed regulations on November 21, 1997, to amend Chapter 57 (relating to electric service) by adding Subchapter O (relating to advanced meter deployment). On January 16, 1998, a copy of the proposed rulemaking was submitted to IRRC and the Chairpersons of the House Consumer Affairs Committee and the Senate Consumer Protection and Professional Licensure Committee. The proposed amendments were published at 28 Pa.B. 493 (January 31, 1998), with a 30-day comment period.

Written comments were received from: the Consumer Advisory Council of the Pennsylvania Public Utility Commission (CAC); CellNet Data Systems Inc. (CellNet); Connex; Energy Monitoring Products Corporation (EMON); ENRON Power Marketing Inc. (ENRON); Environmentalists; the International Brotherhood of Electrical Workers' Pennsylvania Utility Caucus (IBEW); IRRC; ITRON Inc. (ITRON); OCA; the Mid-Atlantic Power Supply Association (MAPSA); New Energy Ventures (NEV); the Pennsylvania Electric Association (PEA); PECO Energy (PECO); the Pennsylvania Gas Association (PGA); Pennsylvania Power and Light Company (PP&L); the Pennsylvania Rural Electric Association (PREA); Representative Frank Tulli; Representative William Lloyd; Senator Allen Kukovich; UGI Utilities, Inc.-Electric Division (UGI); and Williams (an interstate natural gas pipeline company).

The Commission approved the final regulations at this docket on May 14, 1998. On May 18, 1998, the Commission delivered the final regulations to the Senate Consumer Protection and Professional Licensure Committee, the House Consumer Affairs Committee and IRRC.

The Senate Consumer Protection and Professional Licensure Committee and the House Consumer Affairs Committee concerns centered on provisions in the final regulations which:

##### *Added New Language in §§ 57.251 and 57.255(f)*

1. § 57.251—Moreover, while this subchapter does not require the unbundling of meter services to facilitate the deployment and use of advanced metering equipment, nothing in this subchapter precludes the Commission from granting a petition by an EDC or other interested party to unbundle meter services in order to promote competitive services.

2. § 57.255(f)—The EDC's responsibilities described in this section are not applicable to an EDC if the Commis-

sion has issued an order directing the unbundling of meter services in the EDC's service territory.

*Deleted Existing Language in § 57.255*

3. § 57.255—references to "EDC employees" in subsections (b), (d) and (e).

4. § 57.255(d)—An employe of the EDC shall physically read an automated meter in compliance with § 56.12(5)(ii) (relating to remote meter readings).

IRRC's concerns centered on:

*Need for Clarification in §§ 57.253 and 57.257*

1. § 57.253(a)(2)(i)—The Metering Committee will be making a recommendation to the Commission regarding the inclusion of certain technologies in the Advanced Meter Catalog (Catalog);

2. § 57.257(a) and (b)—Dispute resolution options.

*Need for Additional Language in § 57.253*

3. § 57.253(a)(2)(iv)—An EDC will be provided an opportunity to respond to the Metering Committee regarding costs and incompatibility associated with a particular advanced meter request for inclusion in the catalog.

To solicit input from the various stakeholders on the designated standing committees' concerns, the Commission reconvened the Metering Working Group on August 6, 1998. Representatives of EGSs, EDCs, advanced meter companies, the IBEW, the OCA and the American Association of Retired Persons (AARP) were present at this meeting. The Metering Working Group deferred resolution of these issues to the IBEW, PEA and the Commission.

After discussions on the issues of concern to the Senate Consumer Protection and Professional Licensure Committee and the House Consumer Affairs Committee, both the IBEW and PEA agreed to:

*Delete Existing Language in § 57.251*

1. § 57.251—Moreover, while this subchapter does not require the unbundling of meter services to facilitate the deployment and use of advanced metering equipment, nothing in this subchapter precludes the Commission from granting a petition by an EDC or other interested party to unbundle meter services to promote competitive generation services.

*Replace with New Language in § 57.251*

§ 57.251—Nothing in this subchapter will preclude the Commission from approving a restructuring settlement agreement which incorporates advanced meter provisions contrary to the requirements provided in § 57.255. In the event that the Commission takes such action, the EDC and EGS shall be exempt from complying with § 57.255(a)—(g) to the extent necessary to comply with the restructuring settlement agreement. However, under all circumstances, the EDC and EGS shall comply with the remaining sections contained within this subchapter including § 57.255(h).<sup>1</sup>

*Delete Existing Language in § 57.255(f)*

2. § 57.255(f)—The EDC responsibilities described in this section are not applicable to an EDC if the Commis-

<sup>1</sup>The Commission notes that the scenario addressed in this compromise language which opens metering to competition has already occurred in several EDC service territories. Similar outcomes may also occur as a result of other restructuring settlement agreements. The Commission adds that the Metering Working Group, at a meeting held on September 25, 1998, supported the various concepts articulated in the compromise language. Representatives of EDCs, EGSs, IBEW, metering companies, AARP, and the Pennsylvania Utility Law Project were in attendance at this meeting.

sion has issued an order directing the unbundling of meter services in the EDC's service territory.

*Add New Subsection—§ 57.255(h)*

§ 57.255(h)—In the event that the Commission approves a restructuring settlement agreement incorporating EDC metering responsibilities contrary to the provisions in any section of this subchapter, the terms and conditions of such agreement shall, to the extent applicable, govern the EDC responsibilities.

*Delete Existing Language in § 57.255*

3. §§ 57.255(b), (d) and (e)—reference to "EDC employe."

*Add New Subsection—§ 57.255(g)*

§ 57.255(g)—An EDC responsible for providing metering services on a customer's premises shall ensure that the work is done by responsible individuals whose activities in the performance of these services are under the control of the EDC and who are qualified to perform the work according to the EDC's specifications and good utility practices.

*Reinsert Deleted Subsection—§ 57.255(d)*

4. § 57.255(d)—An EDC shall physically read an automated meter in compliance with § 56.12(5)(ii) (relating to physical reads of remote meters).<sup>2</sup>

In response to the concerns of the Senate Consumer Protection and Professional Licensure Committee and the House Consumer Affairs Committee, the Commission hereby adopts the compromise language agreed to by the IBEW and PEA as previously discussed herein.

In addition, as a result of the delays associated with the designated standing committee disapproval and IRRC disapproval and the resubmission process, the Commission modifies the date of the Metering Committee's Initial Report to the Commission to 1999 as provided in § 57.253(a)(3). This change will ensure adequate preparation time for the initial report. The Commission also modifies § 57.252 (Definition of Metering Committee) and § 57.253(a)(1) (Approval of Advanced Meters) to include EDC electrical worker union interests since this group is a stakeholder in metering issues. The PEA concurred that union interests should be included on the Metering Committee.

In response to IRRC concerns we:

*Add New Language in § 57.253*

1. § 57.253(a)(2)(i)—The Committee will include recommendations to the Commission in the catalog for a variety of technologies that support the demands of customers and the services of EGSs expected in the market.

*Delete Existing Subsections—§§ 57.257(a) & (b)*

2. § 57.257(a) and (b)—The Commission already has formal dispute resolution procedures; and

*Add New Language in § 57.253*

3. § 57.253(a)(2)(iv)—Upon receipt of a written request for inclusion of an advanced meter in the Catalog, the Committee shall serve notice on an affected EDC. The EDC shall have 30 days from the date of receipt of the notice to respond to the Committee regarding costs and incompatibility.

To fulfill our Legislative mandate to provide for an orderly transition of the electric industry of this Common-

<sup>2</sup>This subsection now becomes the new § 57.255(e). The present § 57.255(e) becomes the new § 57.255(f).

wealth from a vertically integrated monopoly to a structure which will support the development of a competitive retail generation market, the Commission amends its regulations to facilitate the deployment of advanced metering equipment and the associated development of generation service based upon such technologies while maintaining the safety and reliability of the electric system in this Commonwealth.

The Commission believes that the modifications herein address the concerns of the designated standing committees of the General Assembly and IRRC and moreover are in the public interest. This order sets forth, in Annex A, final regulations governing advanced metering in this Commonwealth.

Accordingly, under sections 501 and 2807(a) and (d) of the Public Utility Code, 66 Pa.C.S. §§ 501 and 2807(a) and (d), and the Commonwealth Documents Law (45 P. S. § 1202 et seq.) and the regulations promulgated thereunder at 1 Pa. Code §§ 7.1—7.4, the Commission adopts the regulations at 52 Pa. Code §§ 57.1—57.141, as noted above and as set forth in Annex A; *Therefore,*

*It Is Ordered:*

1. That this revised final rulemaking containing the response and recommendations of this Commission which includes Annex A, consisting of the final-form regulation and the findings of IRRC shall be served forthwith upon the designated standing committees of each House of the General Assembly, IRRC, the Office of the Attorney General and the Governor's Budget Office.

2) That the regulations of the Commission, 52 Pa. Code Chapter 57, are amended by adding §§ 57.251—57.259 to read as set forth in Annex A.

3) That, upon approval or acquiescence in accordance with 71 P. S. § 745.7(a)(2), the Secretary shall duly certify this order and Annex A and deposit them with the Legislative Reference Bureau for publication in the *Pennsylvania Bulletin*.

4) That a copy of this order and Annex A be served upon all jurisdictional electric utility companies, the Office of Consumer Advocate, the Office of Small Business Advocate, and Electric Competition Legislative Stakeholders and all other Commentators.

5) That these final-form regulations shall become effective upon publication in the *Pennsylvania Bulletin*.

*By the Commission*

JAMES J. MCNULTY,  
*Secretary*

*(Editor's Note: For the text of the order of the Independent Regulatory Commission relating to this document, see 28 Pa.B. 5920 (December 5, 1998).)*

**Fiscal Note:** Fiscal Note 57-190 remains valid for the final adoption of the subject regulations.

#### Annex A

### TITLE 52. PUBLIC UTILITIES

#### PART I. PUBLIC UTILITY COMMISSION

#### CHAPTER 57. ELECTRIC SERVICE

#### Subchapter O. ADVANCED METER DEPLOYMENT

Sec.	
57.251.	Purpose.
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57.257.	Disputes concerning advanced metering.
57.258.	Record retention and reporting requirements.
57.259.	Customer education on advanced metering.

#### § 57.251. Purpose.

(a) The purpose of this subchapter is to facilitate the deployment of advanced metering equipment and the associated development of generation services based on these technologies. This subchapter establishes a procedure for identifying and providing for customer selection of qualified advanced meters, meter-related devices or deployment of automatic meter reading network equipment from the EDC while maintaining the safety and reliability of the electric system in this Commonwealth. This subchapter does not require the public to participate in an advanced metering program.

(b) This subchapter will not preclude the Commission from approving a restructuring settlement agreement which incorporates advanced meter provisions contrary to the requirements in § 57.255 (relating to EDC responsibilities regarding advanced metering). If the Commission takes this action, the EDC and EGS shall be exempt from complying with § 57.255(a)—(g) to the extent necessary to comply with the restructuring settlement agreement. However, under all circumstances, the EDC and EGS shall comply with the remaining sections contained within this subchapter including § 57.255(h).

#### § 57.252. Definitions.

The following words and terms, when used in this subchapter, have the following meanings, unless the context clearly indicates otherwise:

*Advanced meter network or network*—A communications infrastructure that upgrades an existing meter system in an EDC service territory to provide for automated meter reading or other services and is used for customer billing.

*Advanced meter standards*—A set of standards which define minimum compatibility, accuracy and functional requirements for an advanced meter, meter-related device or network as applicable.

*Commission*—The Public Utility Commission of the Commonwealth.

*EDC—Electric distribution company*—A public utility providing facilities for the jurisdictional transmission and distribution of electricity to retail customers, except building or facility owners/operators that manage an internal distribution system which serves a building or facility and which supplies electric power and other related electric power services to occupants of that building or facility.

*EGS—Electric generation supplier*—A person or corporation, including municipal corporations which choose to provide service outside their municipal limits except to the extent provided prior to January 1, 1997, brokers, and marketers, aggregators or other entities, that sells to end-use customers electricity or related services utilizing the jurisdictional transmission or distribution facilities of an EDC or that purchases, brokers, arranges or markets electricity or related services for sale to end-use customers utilizing the jurisdictional transmission and distribution facilities of an EDC. The term excludes building or facility owner/operators that manage the internal distribution system serving the building or facility. The term excludes electric cooperative corporations except as provided in 15 Pa.C.S. Chapter 74 (relating to generation choice for customers of electric cooperatives).

*Metering committee or committee*—An advisory body to the Commission which advises on advanced metering matters and which consists of, to the extent possible, an

equal number of representatives of EDCs, EGSs, as well as consumer, environmental and EDC electrical worker union representatives.

*Meter-related device*—A device identified through the process established under this subchapter which may be attached to an existing standard meter that supports the provision of generation services in a competitive market and meets certain advanced meter standards.

*Modify a profile interval*—A function which permits a meter to store information on a variety of subhourly and hourly time intervals.

*Multiple callout capability*—A function which permits more than one party to have remote access to an advanced meter.

*Net incremental cost*—An analysis of the difference between the costs associated with existing standard meters and those with the advanced capabilities of the particular advanced meter or meter-related device at issue. The analysis should take into account the acquisition cost of the meter or meter-related device, including economies of scale, as well as costs associated with its installation, reading and maintenance.

*Password protection*—A function which permits a meter to provide information only to parties with legitimate access rights.

*Pulse output*—A function which permits a meter to provide pulses, when each pulse represents a specific amount of electric usage.

*Qualified advanced meter*—A customer's billing meter identified through the process established under this subchapter that supports the provision of generation services in a competitive market and meets certain advanced meter standards established by the Commission.

*Retail electric customer or customer*—A direct user of electric power as defined by 66 Pa.C.S. § 2803 (relating to definitions).

**§ 57.253. Approval of advanced meters.**

(a) A qualified advanced meter, meter-related device or network shall be the customer's billing meter and shall meet certain advanced meter standards established by the Commission according to the following process:

(1) The Office of the Executive Director will appoint and chair a Metering Committee (Committee) composed of, to the extent possible, a balanced number of representatives from EDCs and EGSs, as well as representatives of consumer, environmental and EDC electrical worker union interests. The Committee will be designated an advisory body to the Commission as provided in this subsection.

(2) The Committee will meet as necessary to establish and modify recommendations to the Commission for a catalog of qualified advanced meters, meter-related devices and networks or to review recognized changes and improvements in metering technology.

(i) The Committee will include recommendations to the Commission in the catalog for a variety of technologies that support the demands of customers and the services of EGSs expected in the market. These technologies may include: networks, two-way communication, time of use capabilities, load management, net metering for self-generation and similar services. Qualified advanced meters, meter-related devices and networks shall meet the standards described in § 57.254 (relating to advanced meter standards)

(ii) The Committee will consider applicable technical standards, manufacturers' information, another state's approval of a particular type of meter, meter-related device or network and other appropriate areas in its meter catalog deliberations.

(iii) An interested party shall request, in writing, to have an advanced meter, meter-related device or network to be considered for review by the Committee. The written request shall include a brief description of the subject meter, meter-related device, or network, manufacturers' information, any proposal to use the device other than on a Statewide basis, a statement claiming compliance with applicable standards in § 57.254, and other information necessary for a Committee recommendation.

(iv) Upon receipt of a written request for inclusion of an advanced meter in the Catalog, the Committee shall serve notice on an affected EDC. The EDC shall have 30 days from the date of receipt of the notice to respond to the Committee regarding costs and incompatibility. In the absence of an EDC response to costs and incompatibility, the Committee may assume that the subject device is compatible and incremental costs are de minimis.

(v) The Committee will make a recommendation to the Commission regarding the subject meter, meter-related device or network within 60 days from the date the request is received. The interested party that proposed the meter or device, and any other interested party, shall have 14 days to submit comments to the Commission concerning the Committee's recommendation.

(vi) Upon receipt of the Committee's recommendations, the Commission will serve the recommendations on affected parties consistent with a service list developed by the Office of Executive Director, including all EDCs, the OCA, the Office of Small Business Advocate (OSBA) and the Office of Trial Staff. The Commission will issue a decision regarding approval of the subject meter, meter-related device or network within 60 days of the receipt of the Committee's recommendation.

(3) The Committee will submit a report to the Commission by October 1, 1999, and at least annually thereafter, with its considerations and recommendations.

(4) The Committee shall include in its reports to the Commission facts concerning anticipated net incremental costs of qualified advanced meters or meter-related devices and recommendations concerning the appropriate level and manner of payment of the charges, if any.

(b) Customers or EGSs, or both, shall be responsible for any net incremental costs incurred by the EDC as a result of using a qualified advanced meter or meter-related device.

(1) Customers using a qualified advanced meter or meter-related device may be assessed a bill surcharge by the EDC to cover any net incremental cost associated with the choice to use an advanced meter.

(2) Instead of a customer surcharge, the EGS may pay the EDC for net incremental costs.

(3) The customer and EGS may mutually agree to allocate the charges between them.

(c) Any customer surcharge or EGS payment for qualified advanced meters or meter-related devices shall be incorporated in the tariff of each EDC approved by the Commission.

**§ 57.254. Advanced meter standards.**

(a) A qualified advanced meter, meter-related device and a network shall conform to §§ 57.20—57.25 (relating

to meter testing) and the American National Standards Institute Standard C12, as applicable, or as these standards may be updated.

(b) A qualified advanced meter, meter-related device and network shall be the customer's billing meter and shall meet the standards adopted by the Commission from time to time after consideration of the recommendations of the Committee. Qualified advanced meters, meter-related devices or networks shall possess open, nonproprietary communications capabilities to allow both an EGS and an EDC to access information in a standard data format. In addition, a qualified advanced meter, meter-related device or network shall be capable of measuring hourly usage and may support one or more functional requirements, such as the ability to do one or more of the following:

- (1) Modify a profile interval.
- (2) Provide a communications port for a customer to monitor usage.
- (3) Provide a pulse output to allow for usage monitoring.
- (4) Provide password protection.
- (5) Measure in two directions.
- (6) Have multiple callout capability.

(c) Access to meter reading information shall be limited only to the customer, the EDC or the current EGS.

(d) A meter, meter-related device and network that meets the requirements in subsections (a) and (b) shall be considered a qualified advanced meter, meter-related device and network and shall be subject to applicable surcharges and other requirements of this subchapter. The Commission will periodically review and revise these requirements as necessary.

**§ 57.255. EDC responsibilities regarding advanced metering.**

(a) Upon written request from both a customer and the EGS of that customer, the EDC shall make available and install for use a qualified advanced meter or meter-related device. The qualified advanced meter shall be the customer's billing meter and shall meet certain standards established by the Commission in § 57.254 (relating to advanced meter standards).

(b) A qualified advanced meter, meter-related device and network, as well as related infrastructure, shall be owned and operated by the EDC as part of its regulated local distribution function. A network may be owned by an EDC or its chosen network provider. An EDC shall be responsible for compliance with the applicable requirements related to installation, calibration, maintenance, testing, physical reading, safety and reliability, as well as installing and maintaining associated infrastructure as applicable.

(c) An EDC shall provide meter reading for billing purposes except when the customer has chosen to receive a separate generation supply bill from its EGS.

(d) An EDC shall install and make operational a qualified advanced meter or meter-related device within 20 business days from the date the request is received by an EDC.

(e) An EDC shall physically read an automated meter in compliance with § 56.12(5)(i) (relating to remote meter reading; estimated billing; ratepayer readings).

(f) The EDC shall develop a procedure to ensure that qualified advanced meters or meter-related devices are available for installation as required in this subchapter. The EDC may purchase and stock the meters, meter-related devices or may otherwise arrange with EGSs and other EDCs for the most economical way to ensure availability.

(g) An EDC responsible for providing metering services on a customer's premises shall ensure that the work be done by responsible individuals whose activities in the performance of these services are under the control of the EDC and who are qualified to perform the work according to the EDC's specifications and good utility practices.

(h) If the Commission approves a restructuring settlement agreement incorporating EDC metering responsibilities contrary to the provisions in any section of this subchapter, the terms and conditions of the agreement shall, to the extent applicable, govern EDC responsibilities.

**§ 57.256. EDC responsibilities regarding network deployment.**

An EDC may deploy a network for automatic meter reading capability if the following conditions are met:

(1) The network is compatible with market requirements as a qualified advanced meter based on Committee review and recommendations as adopted by the Commission.

(2) The application shall include proposed tariffs concerning any charges for deployment of the network.

(3) The application shall include, at a minimum:

(i) A description of the system.

(ii) Implementation time frame.

(iii) Certification on compliance with applicable standards as provided in § 57.254 (relating to advanced meter standards).

(iv) Implementation costs.

(v) Summary of educational materials on new technologies.

(vi) Impacts on customer electric bills.

(vii) Impacts on existing and anticipated advanced metering equipment and generation services.

**§ 57.257. Disputes concerning advanced metering.**

(a) A dispute between an EDC and a residential or small commercial customer, or between an EGS and a residential or small commercial customer, shall be filed with the Bureau of Consumer Services as an informal complaint for mediation and dispute resolution under §§ 3.111 and 3.112 and 56.161—56.224. The Bureau of Consumer Services will provide a notice of the dispute and notice of the opportunity to participate to the EDC, EGS and to other parties associated with the complaint.

(b) When a customer, applicant or other interested party expresses dissatisfaction with an EDC or EGS decision or explanation of its actions covered by this subchapter, the EDC or EGS shall inform the customer, applicant or other interested party of the right to have the problem considered and reviewed by the Commission as an informal or formal complaint. The EDC or EGS shall explain how to file a complaint and otherwise comply with §§ 3.111, 3.112 and §§ 56.161—56.224.

**§ 57.258. Record retention and reporting requirements.**

- (a) An EDC shall maintain the following records:
  - (1) Updated lists of all qualified advanced meters and meter-related devices.
  - (2) General summary of procedures for advanced meter or meter-related device acquisition and installation.
  - (3) The date of advanced meter purchase request by customer and supplier and date of installation.
  - (4) The summary of qualified advanced meters deployed, including name of manufacturer and serial numbers.
  - (5) The summary of the characteristics and capabilities of each qualified advanced meter deployed.
- (b) An EDC shall retain and make available to the general public upon request information required under subsection (a)(1) and (2). An EDC shall retain and make available to the Commission upon request the information required under subsection (a)(3)—(5). The EDC shall retain the information required under subsections (a)(3)—(5) for 1-calendar year from the date of qualified advanced meter or meter-related device deployment.
- (c) An EDC and EGS shall retain a summary of executed customer terms of service disclosure statements which includes advanced metering provisions as provided in § 57.259 (relating to customer education on advanced metering) and shall be available for Commission review upon request. The EDC and EGS shall retain the summary information regarding an individual customer for a 3-year period commencing from the date of execution of the terms of the service disclosure statement.

**§ 57.259. Customer education on advanced metering.**

- (a) An EDC shall provide an initial summary statement to its customers which describes the availability and general uses of advanced metering. The initial summary statement may be distributed as part of a regularly scheduled customer electric usage bill or other regularly scheduled customer communications as applicable.
- (b) The EGS shall ensure that a customer is informed as to the capabilities, advantages and disadvantages of a qualified advanced meter prior to installation or participation in a generation service program utilizing advanced metering. An EGS shall provide to the customer a terms of service disclosure statement that addresses advanced metering.
- (c) An EDC shall provide, as part of the customer education program, information addressing the use of an advanced meter, basic meter operations and capabilities, advantages and disadvantages of advanced metering, including qualified advanced meter options, applicable costs/surcharges and methods to obtain additional information.
- (d) The informational and promotional materials are required to:
  - (1) Comply with applicable requirements of the act and existing truth-in advertising requirements.
  - (2) Prominently disclose that additional information is available from either the local EDC, the customer's EGS or the Commission.
  - (3) State that the available advanced meters are qualified to meet current Commission performance and technical standards.

[Pa.B. Doc. No. 98-2112. Filed for public inspection December 24, 1998, 9:00 a.m.]