
Design Document for the
Release 4.3
of the
Common
Advanced Metering System
Web Portal and Data Repository
Design, Build, Test, Deploy

Release 4 Design Document for
SMT 3rd Party One-Time Energy Data Agreements
v1 September 6th, 2012

Prepared for
Texas Competitive Electric Market
Transmission and Distribution Service Providers (TDSPs)

Document Information

This Design Document outlines the functional and technical designs that support the build, test and deploy of 3rd Party One-Time Energy Data Agreement

Revision History

Revision Number	Revision Date	Revision By	Summary of Changes	Changes marked
V1	09/06/2012	Ashish Khanduri, Jonathan Hosu, Joselito Samoy, Shaun McCullough	Original Draft	

Approvers

Name
Bob Frazier – CenterPoint Energy Houston Electric, LLC
Donny Helm - Oncor Electric Delivery Company, LLC
Denny Daugherty – AEP Texas North Company, AEP Texas Central Company
Robert Roberts – Texas New Mexico Power Company

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Traceability Matrix, Business & Functional Rules
User Interface & Scenario Analysis
Emails to Customers and 3rd Parties
Application Programming Interface (API)
Technical Design
Workstream Matrix
Solution Design
Issues and Resolutions

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Functional Design



Traceability Matrix, Business & Functional Rules

User Interface & Scenario Analysis

Emails to Customers and 3rd Parties

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Traceability Matrix

Functional Tracker	Business Requirement #	Business Requirement Description	3rd Party	Process Description
3rd Party	BR – 019.015	<ul style="list-style-type: none"> Ability for 3rd parties, customers, and TDSPs to set up LOAs. Note – This is in place for 3rd parties in 3rd Party Phase 1, Customers have the friends and family functionality, and this will not be implemented for TDSPs 	P1.1	<ul style="list-style-type: none"> 3rd Party meets with RES/Business customer and collects information
3rd Party	BR – 019.015	<ul style="list-style-type: none"> Ability for 3rd parties, customers, and TDSPs to set up LOAs. Note – This is in place for 3rd parties in 3rd Party Phase 1, Customers have the friends and family functionality, and this will not be implemented for TDSPs 	P1.2	<ul style="list-style-type: none"> 3rd Party logs into SMT and navigates to My Account/Customer Relationships, then clicks on one the “One-Time LOA for Energy Data” button
3rd Party LOA	BR – 019.012	<ul style="list-style-type: none"> Ability for a 3rd party to attest on the common web portal that they have a Customer authorization (hardcopy or electronic) authorizing them to read only access the Customer’s data 	P1.3	<ul style="list-style-type: none"> On the ‘Create LOA’ page, 3rd Party enters the RES/Business info collected into SMT UI, affirm authorization and clicks ‘Submit’ to initiate the invitation

Traceability Matrix

Functional Tracker	Business Requirement #	Business Requirement Description	3rd Party	Process Description
3 rd Party	BR – 019	<ul style="list-style-type: none"> Ability for a Customer to electronically authorize release of usage data to a 3rd party (i.e. someone other than the Rep of Record - either a REP, aggregator, or registered 3rd party). 	P2.1	<ul style="list-style-type: none"> RES/Business user opens email and clicks on “Accept” to start the acceptance process for the relationship
3rd Party LOA	BR – 019.012	<ul style="list-style-type: none"> Ability for a 3rd party to attest on the common web portal that they have a Customer authorization (hardcopy or electronic) authorizing them to read only access the Customer’s data 	P2.1	<ul style="list-style-type: none"> RES/Business user opens email and clicks on “Accept” to start the acceptance process for the relationship
3rd Party	BR – 019.014	<ul style="list-style-type: none"> Ability for 3rd parties and / or Customers to receive a notification when access has been granted, access has been changed, or access has been revoked for an ESIID 	P2.3, P2.4	<ul style="list-style-type: none"> SMT sends a confirmation email to the RES/Business user (with copy of LOA) indicating that 3rd party has been granted access to one-time report SMT sends a notification email to the 3rd party that the LOA has been accepted

Business Rules

#	Rule
4	If a user does not accept or reject an agreement initiation request from a 3rd party within 30 days, the agreement status becomes "Not Accepted"
6	Agreements in "Not Accept" state cannot be revived
7	Agreements in "Completed" state cannot be revived
8	If the 30 invitation period expires and a user clicks Accept or Reject on the invitation email, SMT will message the user that the invitation has expired.
10	A 3rd Party is allowed up to three One-Time Energy Data agreements per ESIID per year

Functional Rules

#	Rule	Context/Comments
1	If customer is residential non-registered, display an optional language preference field. Do not display Language Preference field for business users	3rd Party initiates a customer agreement request
2	If customer is a registered SMT user, then UI will prompt for only Customer's email address and auto fill Customer Information fields	3rd Party initiates a customer agreement request
3	ESIID/Meter# pair must be validated and not belong to another account if not registered; ESIID/Meter#/Email must be validated if registered	3rd Party initiates a customer agreement request
4	Company Name field with information from Company Profile and cannot be edited	3rd Party initiates a customer agreement request
5	Contact Name, Phone, and Email will be auto populated from personal profile but can be manually overwritten	3rd Party initiates a customer agreement request
6	SMT will forward non-registered user to either a residential or non-residential registration page based on User Information in Customer Agreement initiation request	Non-registered user proceeds to register for an SMT account after accepting or rejecting a customer agreement request
10	Only actions for which a 3rd Party user has permissions will be active on the View & Edit Customer Agreements page	View & Edit Customer Agreement page for both Customers and 3rd Parties
12	If user enters multiple meters or devices during customer agreement initiation, SMT will create separate agreements for each meter or device	3rd Party initiates a customer agreement request
13	If the 30 day invitation period expires and a user clicks Accept or Reject on the invitation email, SMT will message the user that the invitation has expired.	Customer Accepts Ongoing Relationship request
14	If during a "Pending" or "Extension Pending" status changes, and later the customer clicks Accept or Reject on the invitation email, SMT will message that the invitation has expired due to an change in agreement status and will message the customer to go to My Account / 3rd Party Relationships to review the agreements.	Customer Accepts Ongoing Relationship request
15	SMT will pre-populate registration form with information provided in Customer Agreement initiation request form	Non-registered user proceeds to register for an SMT account after accepting or rejecting a customer agreement request
16	"Resend Email" button on a customer agreement will active only when the agreement is in Pending state	3rd Party views a Customer Agreement

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Functional Design

[...]



User Interface & Scenario Analysis

3rd Party initiates request

Customer accepts or rejects request (with optional registration)

Customer views and manages Agreements

3rd Party views and manages Agreements

Emails to Customers and 3rd Parties

[...]

One-Time Energy Data Agreement – 3rd Party initiates One-Time Energy Data Agreement with Customer

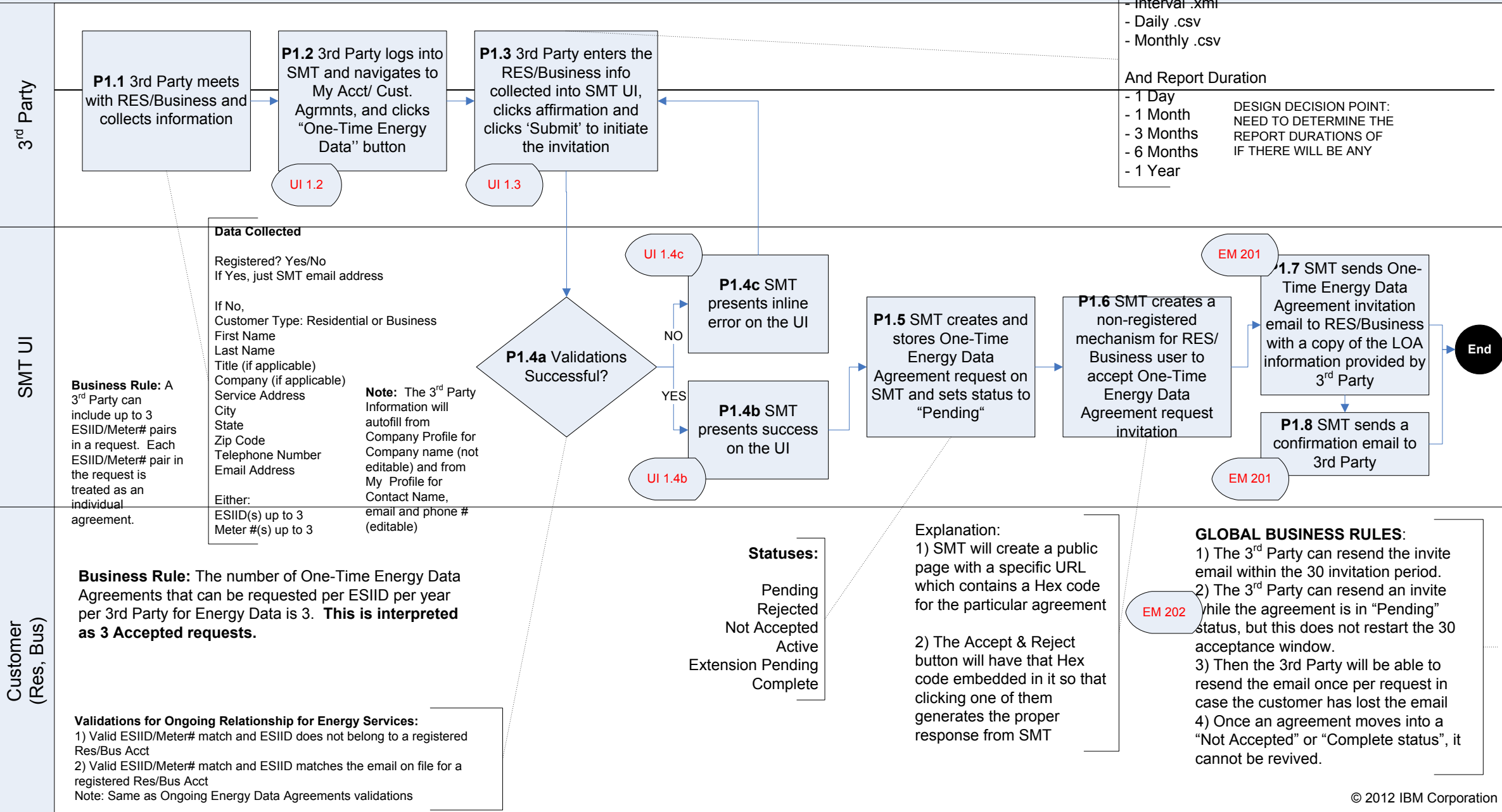
One-Time Energy Data Agreement choices:

- Interval .csv
- Interval .xml
- Daily .csv
- Monthly .csv

And Report Duration

- 1 Day
- 1 Month
- 3 Months
- 6 Months
- 1 Year

DESIGN DECISION POINT:
NEED TO DETERMINE THE
REPORT DURATIONS OF
IF THERE WILL BE ANY



3rd Party initiates One-Time Energy Data Agreement: My Account / Customer Agreements page

UI 1.2

Page will display a search view if User has more than 25 customer agreements as per current production pattern

https://test.smartmetertexas.com/...

SMART METER TEXAS™

Welcome, Tom
Log Out

Home | **My Account** | Usage | Notices | Help

Customer Agreements
HAN Device Messages
My Profile
Company Profile
Manage Users
Pending Approvals

My Account / Customer Agreements

Search for Customer Agreements ?

* Indicates a required field.

Choose your search criteria and type in a one or more search items,

* Select type of agreement search criteria.

- Agreement Number(s)
- Customer Last Name
- ESIID(s)
- Meter Number(s)
- HAN Device MAC Address

Type one or more search items:
(separated by commas)

102*

Search

Create a new agreement:

- Ongoing Energy Data
- Ongoing HAN Services
- One-Time Energy Data
- Add HAN Device

Help: You have more than 25 Customer Agreements associated with your account.

- You may search for an agreement by Agreement number, Customer Last Name, ESIID, Meter Number, HAND Device MAC address
- You may enter a list of up to 100 search items

[\[Hide Help\]](#)

3rd Party initiates One-Time Energy Data Agreement:

Initiate One-Time Energy Data Agreement (page 1 of 2)

UI 1.3

- Functional Rule 1:** If customer is residential non-registered, display an optional language preference field. Do not display Language Preference field for business users
- Functional Rule 2:** If customer is a registered SMT user, then UI will prompt for only Customer's email address and auto fill Customer Information fields
- Functional Rule 3:** Meter Number, ESIID and Email fields must be validated.
- Functional Rule 12:**
If customer enters multiple meters or devices during customer agreement initiation, SMT will create separate agreements for each meter or device

Validation:

ESIID/Meter # pair is not valid:

Your 3rd Party Agreement request cannot be completed at this time due to one of the following reasons:

- The ESIID specified is incorrect

- The Meter # specified is incorrect

- The ESIID/Meter # pair specified is not correct

- The customer may not have a Smart Meter yet. A meter with a digital display is not necessarily a Smart Meter. The customer should contact their REP to determine their meter type.

- If the customer has recently received their Smart Meter, the meter information may not be available for access through the Smart Meter Texas portal until up to 60 days after installation of the Smart Meter

ESIID/Meter #/Email combination is not valid:

- The ESIID/Meter #/Email combination specified is not valid

https://test.smartmetertexas.com/....

SMART METER
TEXAS™

Welcome, Tom
Log Out

Home | My Account | Usage | Notices | Help

Customer Agreements
HAN Device Messages
My Profile
Company Profile
Manage Users
Pending Approvals

My Account / Customer Agreements / Create One-Time Agreement for Energy Data

Initiate One-Time Energy Data Agreement ?

• Complete this form to send an invitation to your customer for a One-Time Energy Data Agreement

• If your meter number starts with a letter, please enter the number without the letter

• The invitation will be sent to the customer email address you provide

• If you customer is already registered, please provide the customer email address associated with their SMT account

*Indicates a required field

*Is customer already registered with SMT?
☐ Yes ☒ No

*Is customer a residential or business user?
☐ Residential ☒ Business

Customer Information

*First Name:

Middle Initial:

*Last Name:

Title:

Language Preference:

Company Name (if applicable)

*Street:

*City:

*State:

*Zip:

Phone Number:

*Email Address:

ESIID

Meter Number

*Meter 1:

Meter 2:

Meter 3:

☐ Interval csv ☐ Interval xml ☐ Daily csv ☐ Monthly csv

*Report Type:

*Report Duration:

Select report duration

X months

X months

X months

X months

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3rd Party initiates One-Time Energy Data Agreement:

Initiate One-Time Energy Data Agreement (page 2 of 2)

- Business Rule 10:**
A 3rd Party is allowed up to three One-Time Energy Data agreements per ESIID per year
- Functional Rule 4:**
Company Name field will display information from Company Profile and cannot be edited
- Functional Rule 5:**
Contact Name, Phone, and Email will be auto populated from personal profile but can be manually overwritten

UI 1.3

https://test.smartmetertexas.com/...

SMART METER
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Welcome, Tom
Log Out

Home | My Account | Usage | Notices | Help

Customer Agreements
HAN Device Messages
My Profile
Company Profile
Manage Users
Pending Approvals

Company Name: ACME ABC

Contact Name: John Smith

Contact Phone: 987-345-2345

Contact Email: john.smit@acmeabc.com

Comments:

Terms and conditions

WEBSITE TERMS AND CONDITIONS
Created: October 2010

These Website Terms and Conditions (these "Terms") set forth the terms and conditions for use of this website (this "Website") to gain access to the Smart Meter Texas (the "Web Portal"). In these Terms, "you" or "your" refers to any user of this Website, and "we" or "us" or "our" refers to the owner(s) or operator(s) of this Website.

Please read these Terms and the information referred to or linked to in these Terms carefully and ensure you understand them. From time to time, we may unilaterally modify these Terms, so it is important that you review these Terms every time you use this Website. Any use of this Website is

* ☐ I agree to use this web portal in accordance with the Terms and Conditions.

Send Invitation

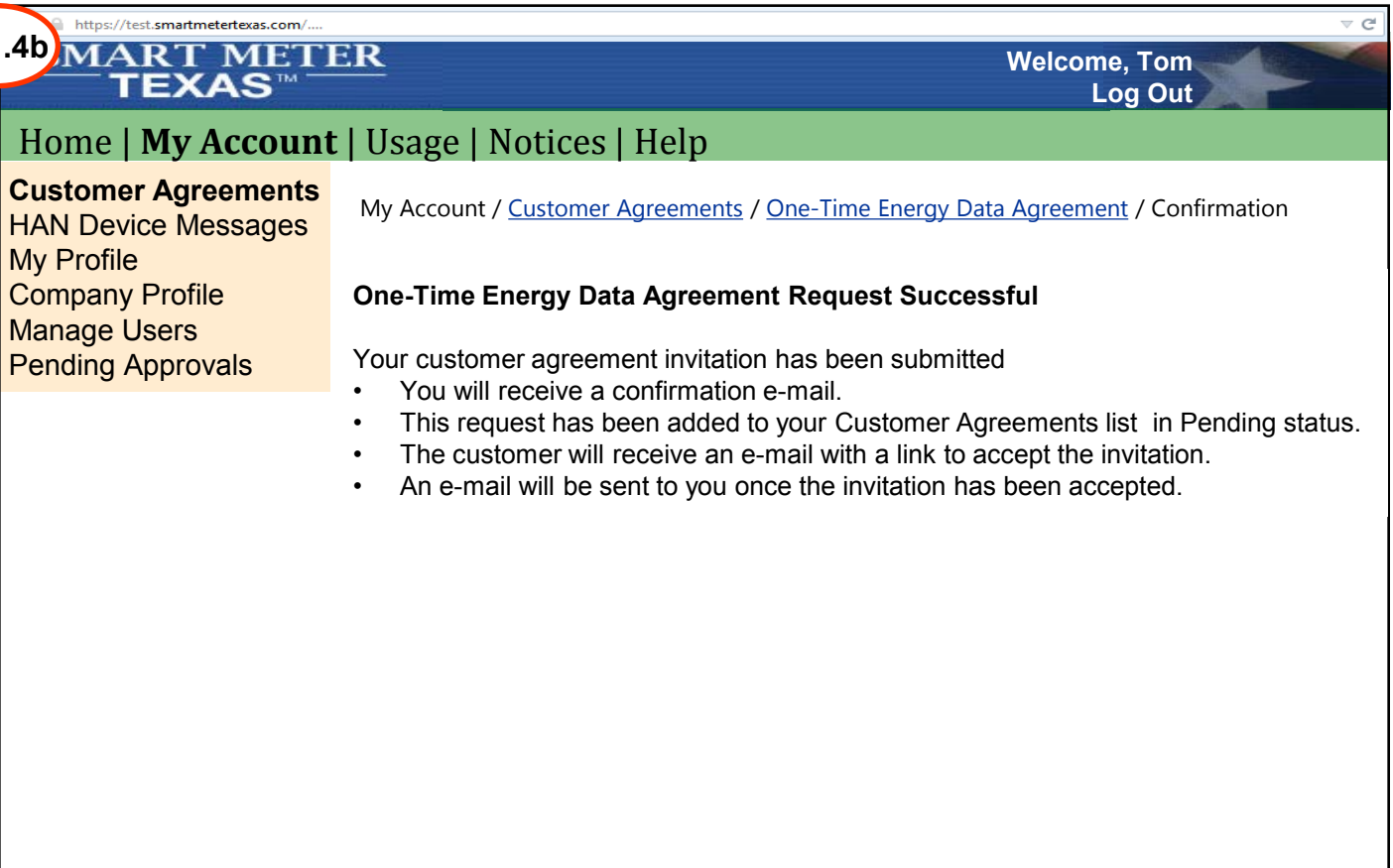
Cancel

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3rd Party initiates One-Time Energy Data Agreement: Customer Agreement Request initiated confirmation page

Customer Agreement is created status is set to Pending

UI 1.4b



The screenshot shows the Smart Meter Texas website interface. The browser address bar displays 'https://test.smartmetertexas.com/...'. The page header includes the 'SMART METER TEXAS' logo and a user greeting 'Welcome, Tom' with a 'Log Out' link. A green navigation bar contains links for 'Home', 'My Account', 'Usage', 'Notices', and 'Help'. A left sidebar menu lists 'Customer Agreements', 'HAN Device Messages', 'My Profile', 'Company Profile', 'Manage Users', and 'Pending Approvals'. The main content area shows the breadcrumb 'My Account / Customer Agreements / One-Time Energy Data Agreement / Confirmation' and a heading 'One-Time Energy Data Agreement Request Successful'. Below the heading, a message states 'Your customer agreement invitation has been submitted' followed by a bulleted list of details.

My Account / [Customer Agreements](#) / [One-Time Energy Data Agreement](#) / Confirmation

One-Time Energy Data Agreement Request Successful

Your customer agreement invitation has been submitted

- You will receive a confirmation e-mail.
- This request has been added to your Customer Agreements list in Pending status.
- The customer will receive an e-mail with a link to accept the invitation.
- An e-mail will be sent to you once the invitation has been accepted.

3rd Party initiates One-Time Energy Data Agreement: My Account / Customer Agreements page

UI 1.2

https://test.smartmetertexas.com/...

SMART METER
TEXAS™

Welcome, Tom
Log Out

Home | My Account | Usage | Notices | Help

Customer Agreements
HAN Device Messages
My Profile
Company Profile
Manage Users
Pending Approvals

My Account / [Customer Agreements](#)

View & Edit Customer Agreement ?

View/Edit Agreement | Export Agreements | View Usage | View HAN Devices

	Relationship Type	Customer Agreement #	Start Date	End Date	ESIID	Customer Last Name	Status
<input type="radio"/>	One-Time Energy	102412000005	10/24/12	10/24/12	1044372...	Xing	Complete
<input type="radio"/>	One-Time Energy	102412000123	10/24/12	05/24/13	1093231...	Chika	Pending
<input type="radio"/>	One-Time Energy	102512000132	10/25/12	10/25/12	1093231...	Gowan	Complete
<input type="radio"/>	HAN Device	102512000137	10/24/12	10/24/12	1008448...	Lombardi	Device Added
<input type="radio"/>	HAN Device	102512000149	10/24/12	10/24/12	1034221...	Oni	Add Pending
<input type="radio"/>	One-Time Energy	102512000167	10/24/12	10/24/12	1059643...	Chandra	Rejected
<input type="radio"/>	One-Time	102512000195	10/24/12	10/24/12	1240123...	Adebayo	Complete
<input type="radio"/>	On Going Energy	102512000233	11/05/12	05/05/13	1004789...	Shi	Active
<input type="radio"/>	HAN Device	102512000321	10/24/12	10/24/12	1001452...	Sandusky	Device Added
<input type="radio"/>	HAN Device	102512000339	10/24/12	10/24/12	1000496...	Hernandez	Device Added
<input type="radio"/>	HAN Device	102512000457	10/24/12	10/24/12	1009159...	Smith	Pending

View/Edit Agreement | Export Agreements | View Usage | View HAN Devices

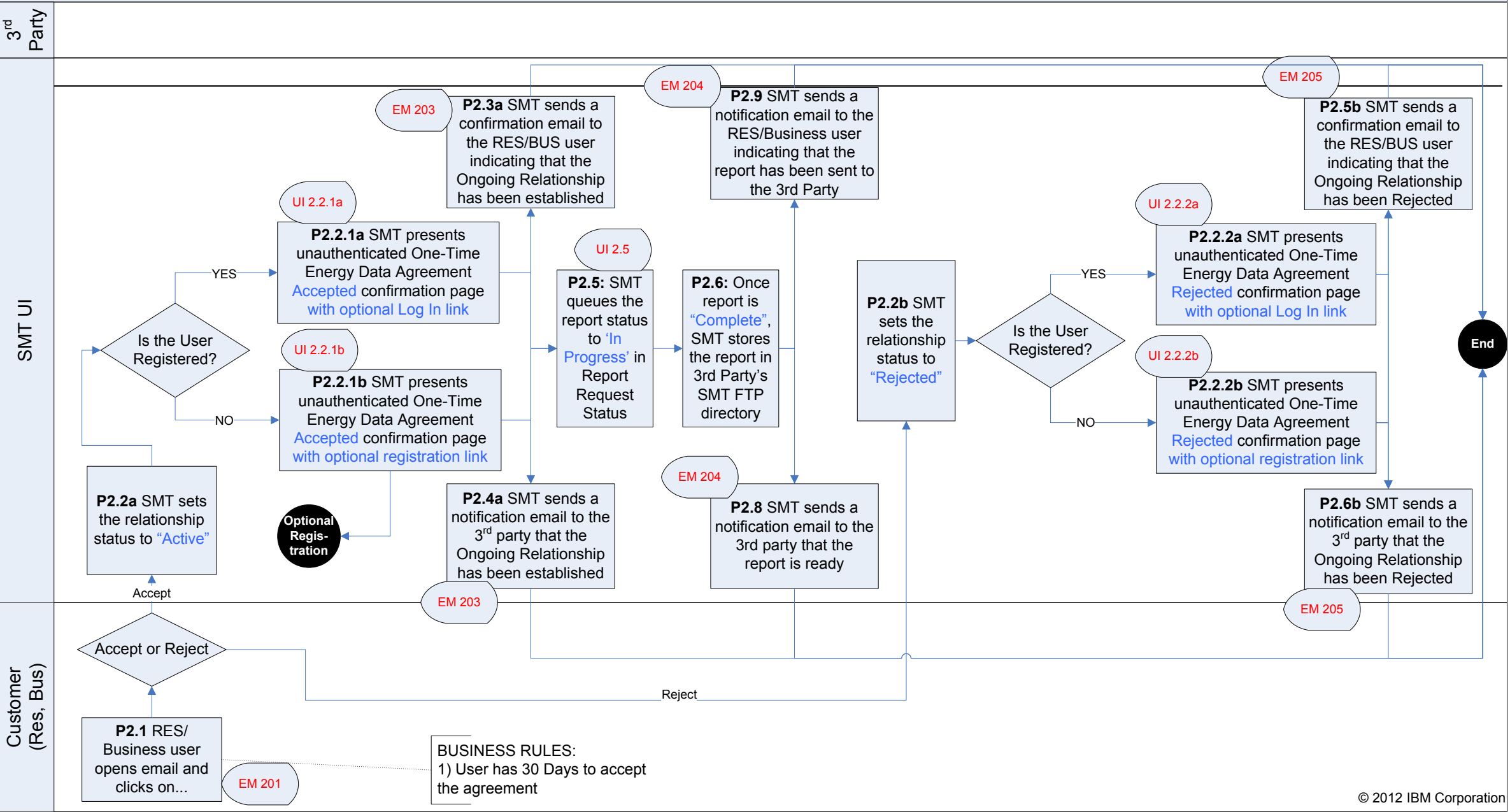
Create a new agreement:

Ongoing Energy Data | Ongoing HAN Services

One-Time Energy Data | Add HAN Device

Page will display a list of customer agreements if User has less than 25 customer agreements as per current production pattern

One-Time Energy Data Agreement – Customer Accepts 3rd Party Invite for One-Time Energy Data Agreement



Customer accepts One-Time Energy Data Agreement request: Customer receives email request (page 1 of 2)

EM 201 Smart Meter Texas - Invitation for One-Time Energy Data Agreement

SMTAdmin to: James J Cochran

04/04/2012 04:44 PM

[Hide Details](#)

From: SMTAdmin@smartmetertexas.com

To: James J Cochran/Kansas City/IBM@IBMUS

SMART METER
TEXAS™

A very **smart way** for Texans
to **manage** electricity!

This is an invitation from <3rd Party> for an Ongoing Energy Data Agreement for you to review and accept/reject.

<3rd Party name> would like to initiate an Ongoing Energy Data Agreement.

Agreement # <XXXXXXXXXXXX>

- This Agreement provides a single energy usage report to <3rd Party name>.
- This energy usage report is for <15 minute interval, Daily, Monthly> usage data, and the length of the report is for the last <1 day, 1 month, 3 months, 6 months, 1 year>

Neither Smart Meter Texas nor any regulatory agency has reviewed <3rd Party name>'s privacy policy. You are encouraged to review the terms of their privacy policy before accepting this agreement, so you can understand how <3rd Party name> collects, uses and shares your information. Their privacy policy can be viewed at: <link> or <The Privacy Policy has not been provided.>

Neither Smart Meter Texas, your Transmission/Distribution Service Provider, nor your Retail Electric Provider is responsible for the privacy statements, practices, or policies of any 3rd Party you grant access to your smart meter data.

Company Name: <3rd Party name>
3rd Party Email: <3rd Party email>
3rd Party Phone Number: <3rd Party phone number>
3rd Party Contact: <3rd Party contact>



Comments: <optional 3rd Party comments>

Customer First Name: <customer first name>
Customer Middle Initial: <customer middle initial>
Customer Last Name: <customer last name>

Customer Address: <customer address>
Customer Email Address: <customer email>
Customer Phone #: <customer phone #>
ESIID: <ESIID> (mask all but last seven)
Meter Number: <meter number>

You have until <expiration date of invitation> to accept this invitation. After that date, the invitation will be voided. Please click "Accept" to complete the acceptance process.

By accepting this invitation, you are authorizing <3rd Party name> to perform the indicated services.

Accept

Reject

[Click Accept to enter an
One-Time Energy Data Agreement
with <3rd Party name>](#)

[Click to Review the Smart Meter Texas Security & Privacy Policy](#)

Clicking the "Accept" or "Reject" button will take you to the Smart Meter Texas website to complete the process.

Regards,
Smart Meter Texas Team

Have a question about Smart Meter Texas? Click [here](#) to view our FAQs.

The Smart Meter Texas 3rd Party program allows a 3rd Party, after obtaining your permission, to obtain and use your Smart Meter Energy Data.

Customer accepts One-Time Energy Data Agreement request: Customer receives email request (page 2 of 2)

As a customer, you own your smart meter data and do not have to grant access to any 3rd Party. Marketing Policies may vary from 3rd Party to 3rd Party. A 3rd Party may market their products and/or services to you regardless of whether or not you choose to grant them access to your smart meter data. Granting access to your smart meter data may enable a 3rd Party to match their product or service with your energy needs.

By approving a 3rd Party's access to your smart meter energy data you are granting them permission to access your service address, meter number, Electric Service Identifier (ESIID), and 15-minute electricity usage data, on a continual basis through Smart Meter Texas, until the agreement expires or you revoke access.

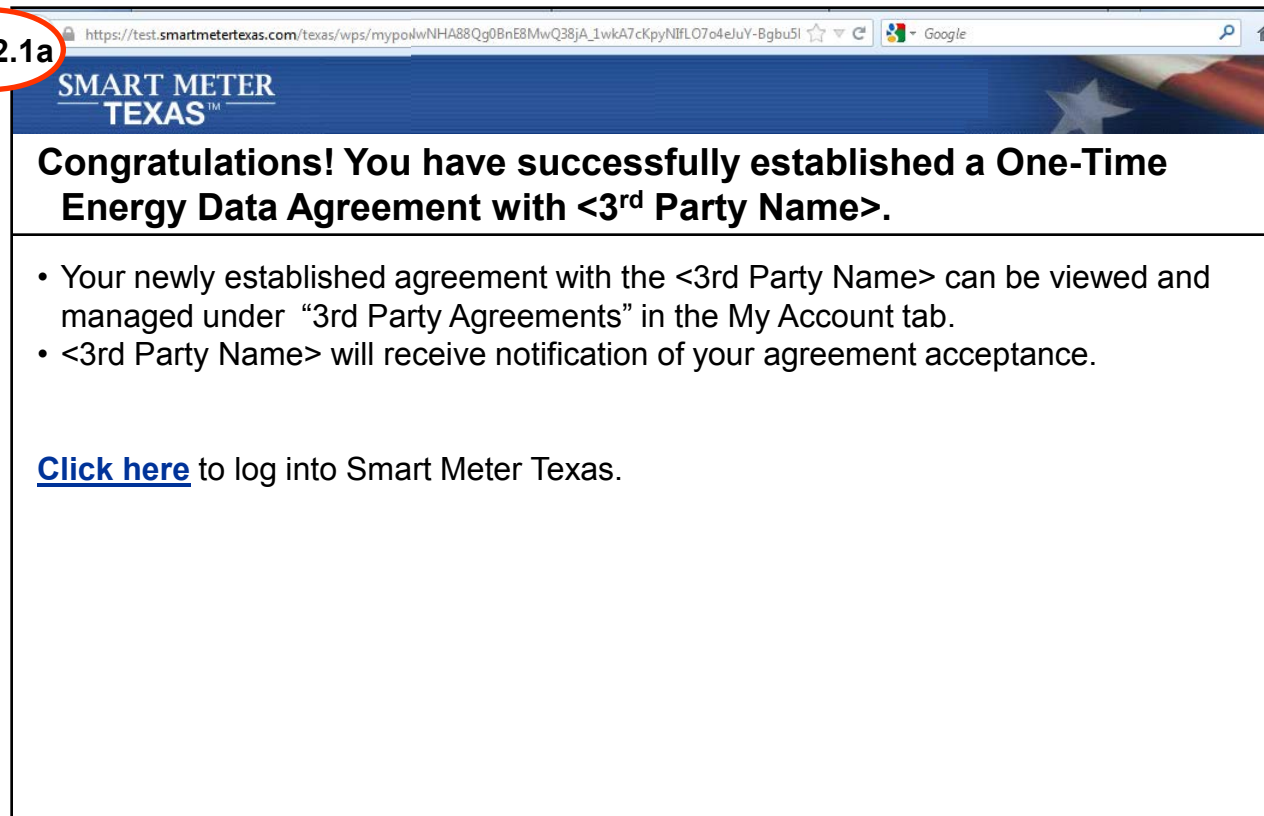
Please note: Any business relationship with a 3rd Party is solely between you and the 3rd Party to whom you grant authorization to access and use your energy data.

Customer accepts One-Time Energy Data Agreement request: Customer Agreement accepted confirmation page – Registered SMT User

Scenario: User is a registered SMT user.

Action: Customer Agreement status is set to Complete; SMT displays congratulations page, log in is optional.

UI 2.2.1a

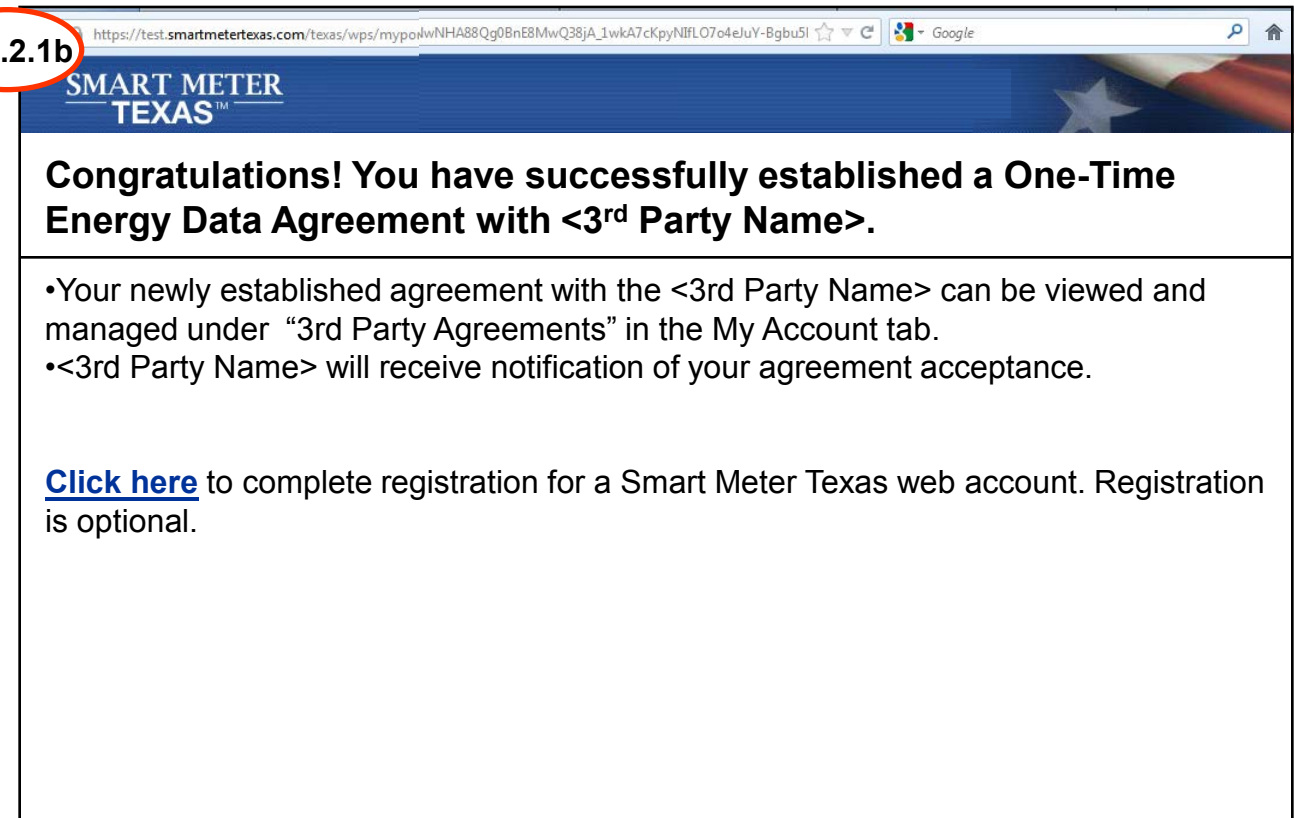


Customer accepts One-Time Energy Data Agreement request: Customer Agreement accepted confirmation page – Unregistered User

Scenario: User is not a registered SMT user.
Action: User is presented a confirmation page.
Agreement status is set to Complete. Optionally,
user may choose to register for an SMT account

Functional Rule 6:
SMT will forward non-registered user to a
residential or non-residential registration page
based on information in Customer Agreement
initiation request form

UI 2.2.1b



Customer accepts One-Time Energy Data Agreement request:
SMT User Account Registration (page 1 of 2)

Functional Rule 15:
SMT will pre-populate registration form with
information provided in Customer Agreement
initiation request form

https://test.smartmetertexas.com/....

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Register

[Home](#) > [Select Account Type](#) >

?

Create a Residential Customer Account

•Provide the following information to obtain access to this web site. If your meter number starts with a letter, please enter the number without the letter.

•Confirmation email will be sent to the email address you provide.

•To complete the initial registration you must follow the instructions provided in the email received.

* Indicates a required field

Personal Information

* First Name:

Chika

Middle Initial:

* Last Name:

Akin

Suffix:

Phone:

987 - 654 - 4321 Ext.

* Account email address:

first.last@hotmail.com

* Re-enter email address:

first.last@hotmail.com

* Language Preference:

English

Security

* User ID:

chika

* ESI ID:

2004897723323

* Meter Number:

2004897723323

22

Customer accepts One-Time Energy Data Agreement request: SMT User Account Registration (page 2 of 2)

<https://test.smartmetertexas.com/...>

Terms and conditions

WEBSITE TERMS AND CONDITIONS
Created: October 2010

These Website Terms and Conditions (these "Terms") set forth the terms and conditions for use of this website (this "Website") to gain access to the Smart Meter Texas (the "Web Portal"). In these Terms, "you" or "your" refers to any user of this Website, and "we" or "us" or "our" refers to the owner(s) or operator(s) of this Website.

Please read these Terms and the information referred to or linked to in these Terms carefully and ensure you understand them. From time to time, we may unilaterally modify these Terms, so it is important that you review these Terms every time you use this Website. Any use of this Website is

* ☐ I agree to use this web portal in accordance with the Terms and Conditions.

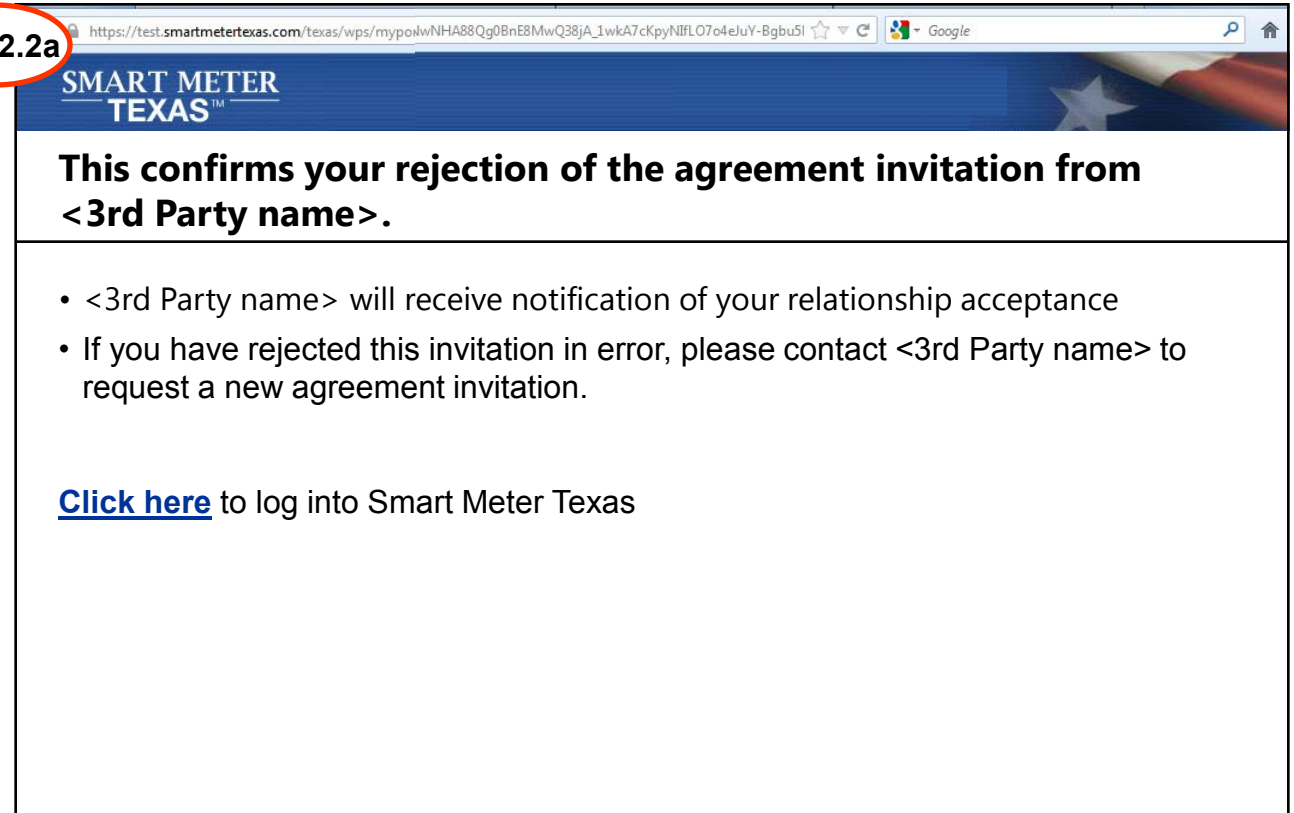
Create Account

Cancel

Customer rejects One-Time Energy Data Agreement request: Customer Agreement rejected confirmation page – Registered SMT User

Scenario: User is a registered SMT user
Action: Customer Agreement status is set to Rejected; SMT displays a confirmation page.

UI 2.2.2a



The screenshot shows a web browser window with the URL https://test.smartmetertexas.com/texas/wps/myportalwNHA88Qg08nE8MwQ38jA_1wkA7ckpyNfL07c4eJuY-8gbu5l. The page header features the "SMART METER TEXAS™" logo and a blue banner with a white star. The main content area has a white background with a black border. It contains the following text:

This confirms your rejection of the agreement invitation from <3rd Party name>.

- <3rd Party name> will receive notification of your relationship acceptance
- If you have rejected this invitation in error, please contact <3rd Party name> to request a new agreement invitation.

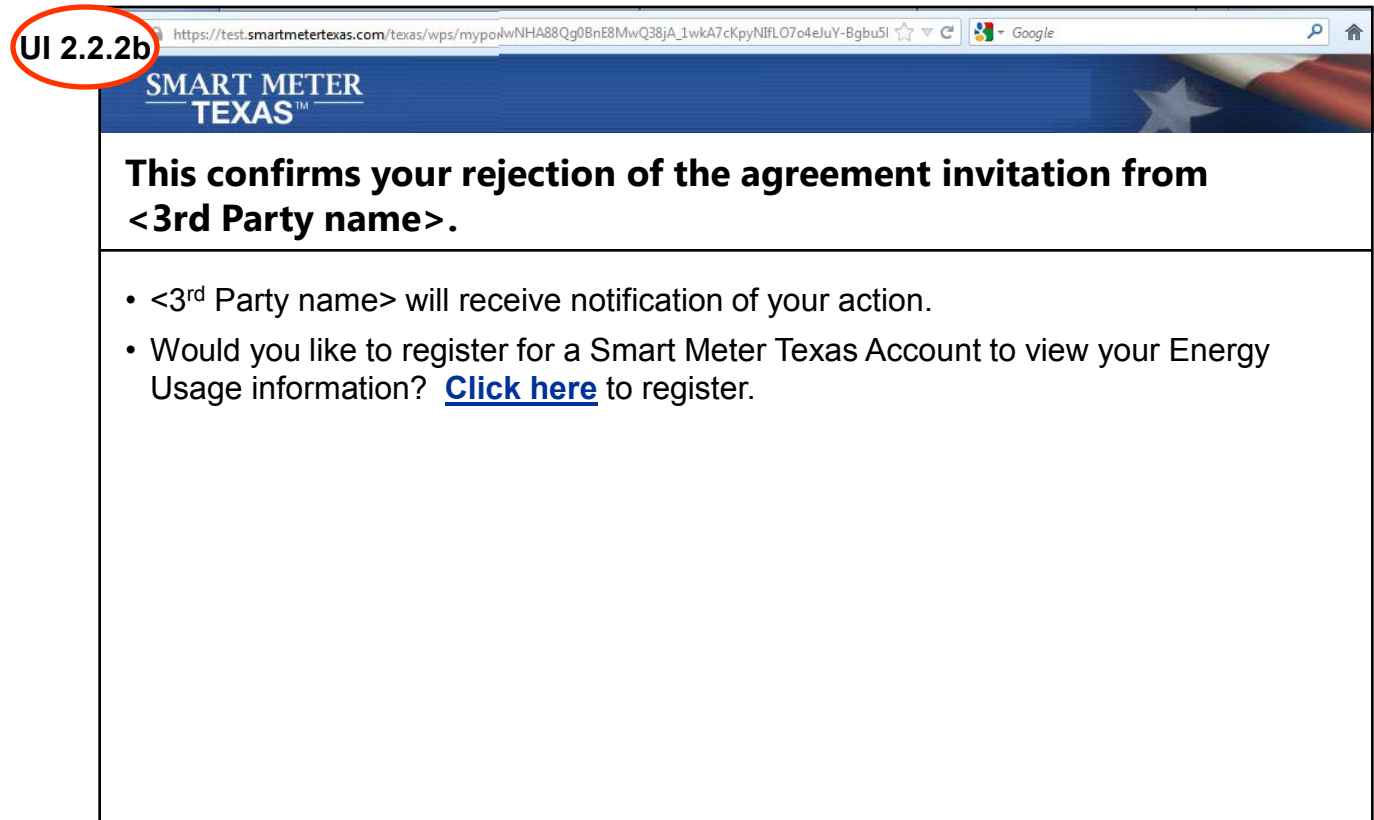
[Click here](#) to log into Smart Meter Texas

Customer rejects One-Time Energy Data Agreement request: Customer Agreement rejected confirmation page – Unregistered User

Scenario: User is not a registered SMT user.
Action: User is presented a confirmation page with a prompt to take him through the SMT account registration process.

Functional Rule 6:

SMT will forward non-registered user to a residential or non-residential registration page based on Customer Information in Customer Agreement initiation request



Customer views and manages 3rd Party Agreements:

View & Edit 3rd Party Agreement page

SMART METER
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Welcome, Tom
Log Out

Home | **My Account** | Usage | Notices | Help

My Smart Meters

3rd Party Agreements

HAN Devices

My Friend's Meters

My Profile

My Friends

My Account / [3rd Party Agreements](#) / View & Edit Customer Agreement

View & Edit Customer Agreement

3rd Party Information

Company Name:Green Energy Services

Contact Name

Phone:244-322-5454

Email:info@greenenergy.com

Customer Information

Customer First Name:Chika

Customer Last Name:Akin

Service Address:400 N Olive Street, Sunnyville, TX 75012

Customer Email Address:cakin@gmail.com

Customer Phone #:000-000-0000

Meter Data

ESIID#:10443720007574303

Meter#:104051941

Customer Agreement

Customer Agreement #:102512000233

Agreement Type:One-Time Energy Data

Agreement Status:Complete

Agreement Start Date:01/01/2012

Agreement End Date:N/A

Report Type:Interval csv

Report Duration:3 months

Accept Agreement

Reject Agreement

Cancel

Help:

- This page show details of a 3rd Party Agreement.
 - If the agreement is in Pending state, you may accept or reject the agreement
 - If the agreement is in Active state, terminate the agreement

[\[Hide Help\]](#)

3rd Party views and manages Customer Agreement: View & Edit Agreement page

Functional Rule 16:
"Resend Email" button on a customer agreement will be active only when the agreement is in Pending state

Functional Rule 10:
Only actions for which a 3rd Party user has permissions will be active on the View & Edit Customer Agreements page

- Help:**
- This page show details of a customer agreement
 - If the Agreement Status is Pending, the customer has not yet accepted or rejected your initiation request
 - You may resend an invitation email for an agreement in Pending status
 - You may terminate an agreement in Active status
- [[Hide Help](#)]

https://test.smartmetertexas.com/....

SMART METER
TEXAS™

Welcome, Tom
Log Out

Home | **My Account** | Usage | Notices | Help

Customer Agreements
HAN Device Messages
My Profile
Company Profile
Manage Users
Pending Approvals

My Account / [Customer Agreements](#) / [View & Edit Customer Agreement](#)

View & Edit Customer Agreement

Customer Information
Customer First Name: Chika
Customer Last Name: Akin
Service Address: 400 N Olive Street, Sunnyville, TX 75012
Customer Email Address: cakin@gmail.com
Customer Phone #: 000-000-0000

3rd Party Information
Company Name: Green Energy Services
Contact Name: James Wilson
Company Phone: 244-322-5454
Company Email: info@greenenergy.com

Meter Data
ESIID#: 10443720007574303
Meter#: 104051941


Customer Agreement
Customer Agreement #: 102512000233
Agreement Type: One-Time Energy Data
Agreement Status: Complete
Agreement Start Date: 01/01/2012
Agreement End Date: N/A

Report Type: Interval csv
Report Duration: 3 months

Resend Email

Cancel

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Customer accepts One-Time Energy Data Agreement request:

Customer receives email request (page 1 of 2)

EM 201

Smart Meter Texas - Invitation for One-Time Energy Data Agreement

SMTAdmin to: James J Cochran 04/04/2012 04:44 PM

Hide Details

From: SMTAdmin@smartmetertexas.com

To: James J Cochran/Kansas City/IBM@IBMUS

SMART METER TEXAS™

A very smart way for Texans to manage electricity!

This is an invitation from <3rd Party> for an Ongoing Energy Data Agreement you to review and accept/reject.

Introduction

<3rd Party name> would like to initiate an Ongoing Energy Data Agreement.

Body

Agreement # <XXXXXXXXXXXX>

- This Agreement provides a single energy usage report to <3rd Party name>.
- This energy usage report is for <15 minute interval, Daily, Monthly> usage data, and the length of the report is for the last <1 day, 1 month, 3 months, 6 months, 1 year>

Neither Smart Meter Texas nor any regulatory agency has reviewed <3rd Party name>'s privacy policy. You are encouraged to review the terms of their privacy policy before accepting this agreement, so you can understand how <3rd Party name> collects, uses and shares your information. Their privacy policy can be viewed at: <link> or <The Privacy Policy has not been provided.>

Neither Smart Meter Texas, your Transmission/Distribution Service Provider, nor your Retail Electric Provider is responsible for the privacy statements, practices, or policies of any 3rd Party you grant access to your smart meter data.

Company Name: <3rd Party name>

3rd Party Email: <3rd Party email>

3rd Party Phone Number: <3rd Party phone number>

3rd Party Contact: <3rd Party contact>

FPO for position only

Comments: <optional 3rd Party comments>

Customer First Name: <customer first name>

Customer Middle Initial: <customer middle initial>

Customer Last Name: <customer last name>

Customer Address: <customer address>

Customer Email Address: <customer email>

Customer Phone #: <customer phone #>

ESIID: <ESIID> (mask all but last seven)

Meter Number: <meter number>

You have until <expiration date of invitation> to accept this invitation. After that date, the invitation will be voided. Please click "Accept" to complete the acceptance process.

By accepting this invitation, you are authorizing <3rd Party name> to perform the indicated services.

Accept

Reject

[Click Accept to enter an One-Time Energy Data Agreement with <3rd Party name>](#)
[Click to Review the Smart Meter Texas Security & Privacy Policy](#)

Clicking the "Accept" or "Reject" button will take you to the Smart Meter Texas website to complete the process.

Regards,
Smart Meter Texas Team

Salutation

Not yet a member of Smart Meter Texas? Click [here](#) to register.

Want to learn more about what Smart Meter Texas can do for you? Click [here](#) to watch a demo.

Have a question about Smart Meter Texas? Click [here](#) to view our FAQs.

Reference

Customer accepts One-Time Energy Data Agreement request: Customer receives email request (page 2 of 2)

The Smart Meter Texas 3rd Party program allows a 3rd Party, after obtaining your permission, to obtain and use your Smart Meter Energy Data.

As a customer, you own your smart meter data and do not have to grant access to any 3rd Party. Marketing Policies may vary from 3rd Party to 3rd Party. A 3rd Party may market their products and/or services to you regardless of whether or not you choose to grant them access to your smart meter data. Granting access to your smart meter data may enable a 3rd Party to match their product or service with your energy needs.

By approving a 3rd Party's access to your smart meter energy data you are granting them permission to access your service address, meter number, Electric Service Identifier (ESIID), and 15-minute electricity usage data, on a continual basis through Smart Meter Texas, until the agreement expires or you revoke access.

Please note: Any business relationship with a 3rd Party is solely between you and the 3rd Party to whom you grant authorization to access and use your energy data.

Education

Emails to Customers and 3rd Parties

#	Scenario
EM201	3rd Party initiates request for One-Time Energy Data agreement
EM202	3rd Party resends request for One-Time Energy Data agreement
EM203	Customer accepts 3rd Party request
EM204	SMT Notifies 3 rd Party that the One-Time Energy Data report has been completed
EM205	Customer rejects 3rd Party request