
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 Ongoing Relationships
v1.2 August 31st, 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 Ongoing Relationships for Energy Usage and HAN Services.

Revision History

Revision Number	Revision Date	Revision By	Summary of Changes	Changes marked
V1	08/30/2012	Ashish Khanduri, Jonathan Hosu, Joselito Samoy, Shaun McCullough	Original Draft	No
V1.1	09/04/2012	Ashish Khanduri, Jonathan Hosu, Joselito Samoy, Shaun McCullough	Revisions per comments from Design Review meeting	No
V1.2	09/06/2012	Jim Cochran	Revisions per 9/5 AMIT Meeting	No

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 (1 of 6)

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 Agreements, then clicks on Create a new: ‘Ongoing 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 	P1.3	<ul style="list-style-type: none"> On Create a new: ‘Ongoing Relationship’ page, 3rd Party enters the RES/Business info collected into SMT UI, clicks affirmation and clicks ‘Submit’ to initiate the invitation
3rd 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

Traceability Matrix (2 of 6)

Functional Tracker	Business Requirement #	Business Requirement Description	3rd Party	Process Description
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 – 301	<ul style="list-style-type: none"> Ability for a Customer to select multiple registered 3rd parties to have limited time based read only access, with a default expiration of 6 months, to their usage data on the common web portal for a single ESIID 	P2.4 Note	<ul style="list-style-type: none"> From here, RES/Business user can select multiple registered 3rd parties and edit access
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 	P2.6, 2.7	<ul style="list-style-type: none"> SMT sends a confirmation email to the RES/Business user (with copy of LOA) indicating that the relationship has been established SMT sends a notification email to the 3rd party that the LOA has been accepted

Traceability Matrix (3 of 6)

Functional Tracker	Business Requirement #	Business Requirement Description	3rd Party Phase II	Process Description
3 rd Party	BR – 019.008	<ul style="list-style-type: none"> Ability for the Customer to actively select a specific expiration date or unlimited access timeframe for 3rd party access other than the default of 6 months 	P3.4.2	<ul style="list-style-type: none"> RES/Business user modifies 3rd Party relationship end date
3 rd Party	BR – 301	<ul style="list-style-type: none"> Ability for a Customer to select multiple registered 3rd parties to have limited time based read only access, with a default expiration of 6 months, to their usage data on the common web portal for a single ESIID 	P3.4	<ul style="list-style-type: none"> RES/Business user modifies 3rd Party relationships - sub storyboards apply
3 rd Party	BR – 019.010	<ul style="list-style-type: none"> Ability for the Customer to electronically allow select / revoke which 3rd parties are authorized for read-only access to their data 	P3.4.4	<ul style="list-style-type: none"> RES/Business user modifies services per ESIID in 3rd Party relationship
3 rd 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 	P3.4.4	<ul style="list-style-type: none"> SMT sends a confirmation email to the 3rd Party/RES user that the relationship has been modified

Traceability Matrix (4 of 6)

Functional Tracker	Business Requirement #	Business Requirement Description	3rd Party	Process Description
3 rd Party	BR – 303	<ul style="list-style-type: none"> Ability for 3rd parties to request a report via API of all the ESIIDs they are authorized to view 	P4.3	<ul style="list-style-type: none"> 3rd Party user views list of existing 3rd Party relationships
3 rd Party	BR – 019.016	<ul style="list-style-type: none"> Ability for 3rd parties to search and view a list of the ESIIDs they are authorized to view Note – In 3rd Party Phase 1, a 3rd party can request the list of ESIIDs they are authorized for 	P4.3	<ul style="list-style-type: none"> 3rd Party user views list of existing 3rd Party relationships
3 rd 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. Note – a security validation needs to be developed for this capability, 3rd Parties can’t log onto the web portal 	P4.3	<ul style="list-style-type: none"> 3rd Party user views list of existing 3rd Party relationships
HAN Functions – Permissions 3 rd Party	BR – 401	<ul style="list-style-type: none"> Ability for the customer to indicate who has permission to control (provision, de-provision, message) their HAN device (i.e. customer only, customer and ROR, customer and 3rd party, customer and TDSP, or any combination of the above with the customer) 	P2.5 Note	<ul style="list-style-type: none"> From here, RES/Business user can select multiple registered 3rd parties and edit access

Traceability Matrix (5 of 6)

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 logs into SMT and navigates to My Account / Customer Agreements, then clicks on Create a new: 'Ongoing Relationship'
3rd Party	BR – 303	<ul style="list-style-type: none"> Ability for 3rd parties to request a report via API of all the ESIIDs they are authorized to view 	P1.2	<ul style="list-style-type: none"> 3rd Party user views list of existing 3rd Party relationships
3rd Party	BR – 019.016	<ul style="list-style-type: none"> Ability for 3rd parties to search and view a list of the ESIIDs they are authorized to view Note – In 3rd Party Phase 1, a 3rd party can request the list of ESIIDs they are authorized for 	P1.2	<ul style="list-style-type: none"> 3rd Party user views list of existing 3rd Party relationships
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. 	P1.2	<ul style="list-style-type: none"> 3rd Party user views list of existing 3rd Party relationships

Traceability Matrix (6 of 6)

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 extension
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 extension
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 	P2.4, 2.5	<ul style="list-style-type: none"> SMT sends a confirmation email to the RES/Business user indicating that the Ongoing Relationship has been extended SMT sends a notification email to the 3rd party that the Ongoing Relationship has been extended
HAN Functions – Permissions 3 rd Party	BR – 401	<ul style="list-style-type: none"> Ability for the customer to indicate who has permission to control (provision, de-provision, message) their HAN device (i.e. customer only, customer and ROR, customer and 3rd party, customer and TDSP, or any combination of the above with the customer) 	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 extension

Business Rules

#	Rule
1	3rd Party can resend an extension request within 30 day window while agreement is in Extension pending status
2	SMT will scan agreements daily and email customers of all agreements that are 30 days from expiration, 14 days from expiration, and 7 days from expiration
3	SMT will scan agreements daily and email 3rd parties of all agreements that are 30 days from expiration, 14 days from expiration, and 7 days from expiration
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"
5	If a user does not accept or reject an agreement extension request from a 3rd party within 30 days, the agreement status will return to "Active" if the agreement end date has not expired
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.
9	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 / 3 rd Party Relationships to review the agreements.

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 Ongoing Relationship 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 Ongoing Relationship 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 Ongoing Relationship request
4	Company Name field with information from Company Profile and cannot be edited	3rd Party initiates Ongoing Relationship request
5	Contact Name, Phone, and Email will be auto populated from personal profile but can be manually overwritten	3rd Party initiates Ongoing Relationship 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	Customer accepts Ongoing Relationship request
7	"Accept Agreement" and "Reject Agreement" buttons must be grayed out if Agreement in Active state	Residential or business user views a 3rd Party Relationship Agreement
8	"Terminate Agreement" and "Extend Agreement" buttons must be grayed out if Agreement in Pending state	Residential or business user views a 3rd Party Relationship Agreement
9	If User selects a duration, the "Extend Agreement" button must be come active	View & Edit Customer Agreement page for both Customers and 3rd Parties
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
11	Extend Agreement, Resend Email and Terminate Agreement buttons will be active only if the agreement is in a suitable state	View & Edit Customer Agreement page for both Customers and 3rd Parties
12	If customer may enter multiple meters or devices during customer agreement initiation, SMT will create separate agreements for each meter or device	3rd Party initiates Ongoing Relationship request
13	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.	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 / 3 rd Party Relationships to review the agreements.	Customer Accepts Ongoing Relationship request

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User Interface & Scenario Analysis – Ongoing Energy Services

3rd Party initiates Ongoing Relationship

Customer accepts or rejects Ongoing Relationship

Customer views and manages Ongoing Relationships

3rd Party requests Extension to an Ongoing Relationship

Customer accepts or rejects Ongoing Relationship Extension
Request

User Interface & Scenario Analysis – Ongoing HAN Services

Emails to Customers and 3rd Parties

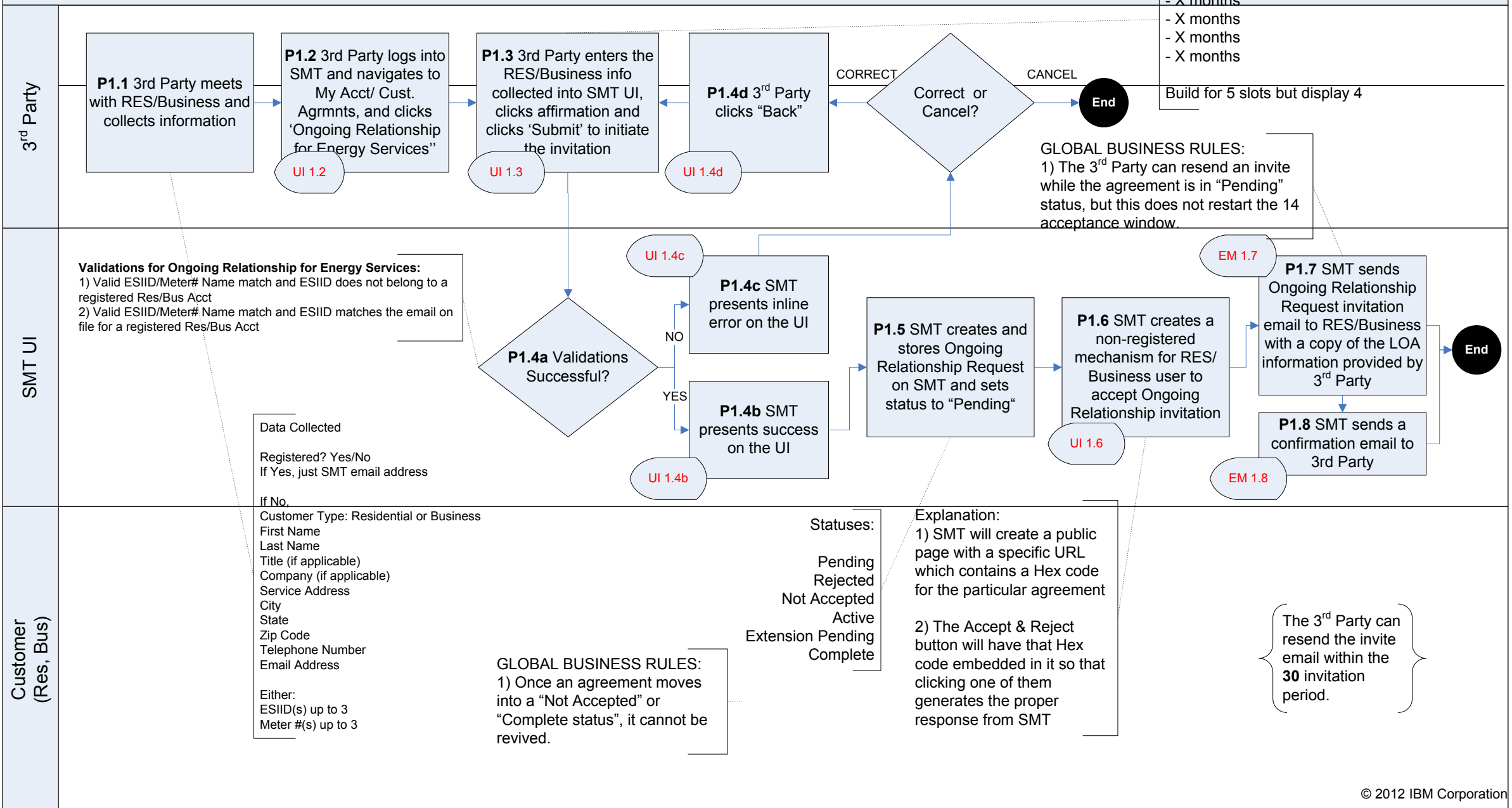
[...]

Ongoing Relationship for Energy Services – 3rd Party initiates Ongoing Relationship with Customer

Working assumption for relationship duration choices:

- X months
- X months
- X months
- X months
- X months

Build for 5 slots but display 4



3rd Party initiates Ongoing Customer Relationship: My Account / Customer Agreements page

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

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

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)
- MAC Address

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

102*

Search

Create a new agreement:

- Ongoing Relationship for Energy Data
- Ongoing Relationship for HAN Services
- Ad Hoc Energy Data
- Add HAN Device

3rd Party initiates Ongoing Customer Relationship: Initiate Ongoing Customer Agreement (page 1 of 2)

UI 1.3

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

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

My Account / Customer Agreements / Create Ongoing Relationship for Energy Services

Initiate Ongoing Relationship for Energy Services

- Provide the following information to obtain access to this website. 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

- *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:	<input type="text"/>	<input type="text"/>
Meter 2:	<input type="text"/>	<input type="text"/>
Meter 3:	<input type="text"/>	<input type="text"/>

*Relationship Duration:

- X months
- X months
- X months
- X months

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:

Customer may enter 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

3rd Party initiates Ongoing Customer Relationship: Initiate Ongoing Customer Agreement (page 2 of 2)

UI 1.3
https://test.smartmetertexas.com/...

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:

Contact Name:

Contact Phone:

Contact Email:

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.

Functional Rule 4:
Company Name field with 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

3rd Party initiates Ongoing Customer Relationship: Customer Agreement initiated confirmation page

Customer Agreement is created status is set to Pending

UI 1.4b

The screenshot shows a web browser window with the URL <https://test.smartmetertexas.com/>. The page header includes the Smart Meter Texas logo and a user greeting: "Welcome, Tom Log Out". A 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 displays a confirmation message: "Ongoing Relationship for Energy Services Request Successful". Below this, it states: "Your customer relationship initiation has been submitted" and lists four bullet points: "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.", and "An e-mail will be sent to you once the invitation has been accepted." A breadcrumb trail at the top of the content area reads: "Customer Agreements / Ongoing Energy Relationship Request Successful".

3rd Party initiates Ongoing Customer Relationship: 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 Name	Status
<input type="radio"/>	1-Time Energy	102412000005	10/24/12	10/24/12	1044372...	Xing	Complete
<input type="radio"/>	On Going HAN	102412000123	10/24/12	05/24/13	1093231...	Garcia	Pending
<input type="radio"/>	1-Time Energy	102512000132	10/25/12	10/25/12	1093231...	Gowan	Pending
<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"/>	1-Time Energy	102512000167	10/24/12	10/24/12	1059643...	Chandra	Rejected
<input type="radio"/>	1-Time Energy	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	Customer Init...

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

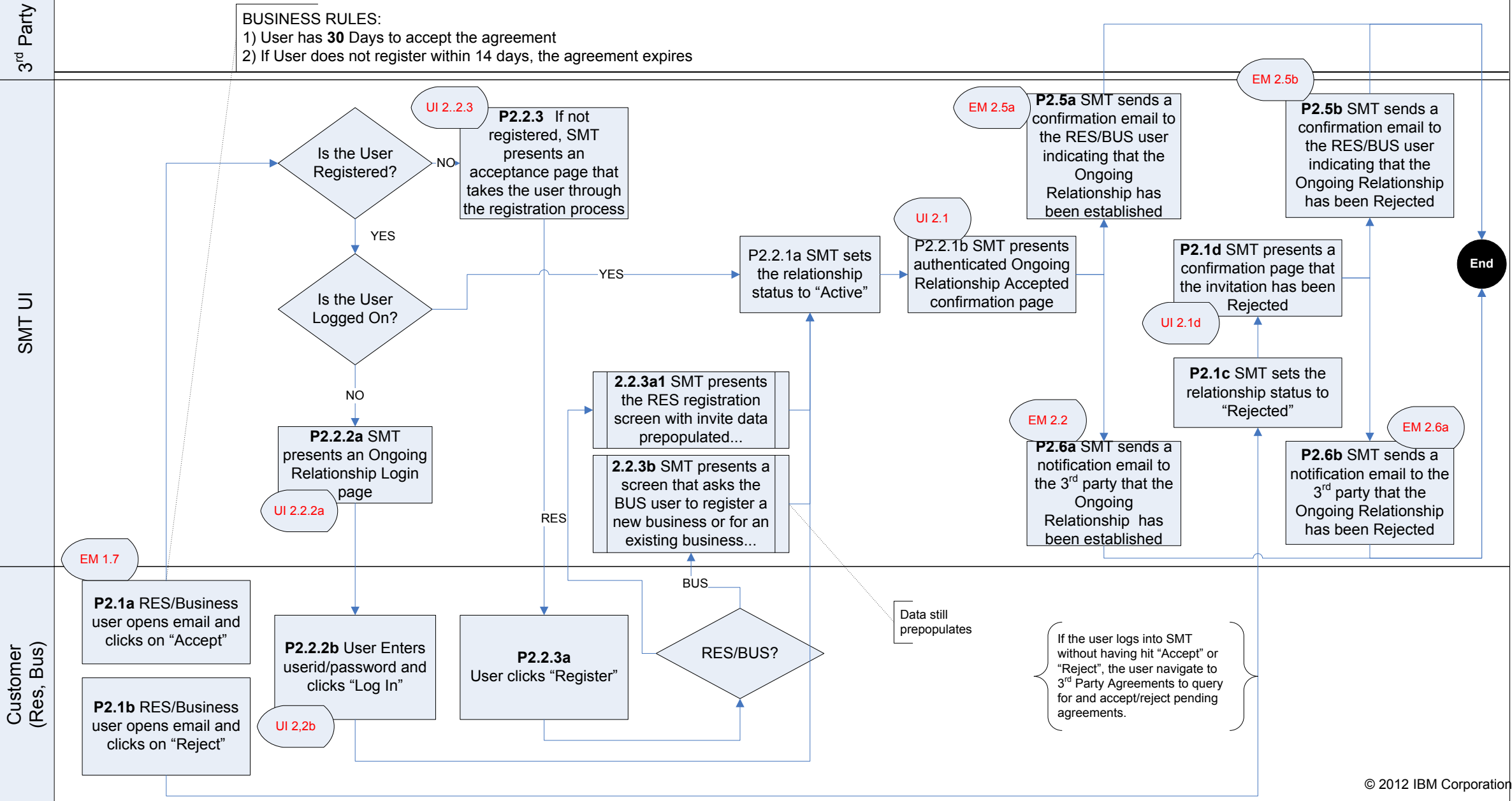
Create a new agreement:

Ongoing Relationship for Energy Data | Ongoing Relationship for HAN Services

Ad Hoc 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

Ongoing Relationship for Energy Services – Customer Accepts 3rd Party Invite for Ongoing Relationship



Customer Accepts Ongoing Relationship Request

Customer Receives Email Request

EM 1.7

Smart Meter Texas 3rd Party Invitation for Ongoing Energy Services
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!

ACME123 ABC invitation for Ongoing Energy Services

ACME ABC has sent you an invitation to initiate an Ongoing Relationship for energy services.
Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe

Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name:	Chika
Customer Middle Initial:	
Customer Last Name:	Akin
Customer Address:	23 Oxford Street Dallas, TX 987654
Customer Email Address:	cakin@gmail.com
Customer Phone #:	000-000-0000
Language Preference:	English
ESIID:	XXXXXXXXXXXX3404378
Meter Number:	1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

ACME ABC has affirmed that you have given them permissions under this Letter of Authorization to perform the indicated services.

Content to be verified by ETF team

Customer Accepts Ongoing Relationship Request: Customer Agreement accepted confirmation page

Scenario: User is a registered SMT user and is already logged into SMT
Action: Customer Agreement status is set to Active; SMT displays congratulations page.

The screenshot shows a web browser window with the URL <https://test.smartmetertexas.com/...>. The page header includes the SMART METER TEXAS logo and a user greeting: "Welcome, Tom Log Out". A navigation bar contains links for Home, My Account, Usage, Notices, and Help. A left sidebar menu lists: My Smart Meters, 3rd Party Relationships (highlighted), HAN Devices, My Friend's Meters, My Profile, and My Friends. The main content area displays the breadcrumb "3rd Party Agreements / Ongoing Energy Data Relationship Accepted" and a bolded message: "Congratulations! You have successfully established an ongoing relationship agreement." Below this, a bulleted list provides details: "Your newly established relationship will be viewed and managed under 'My 3rd Parties' in the My Account tab" and "The 3rd party will receive notification of your relationship acceptance". A red circle highlights the "UI 2.1" label in the top left corner of the browser window.

Customer Accepts Ongoing Relationship Request Customer Receives Email Request

EM 1.7

You have 14 calendar days to accept this invitation. After 14 days, the invitation will be voided. Please click "Accept" to complete the acceptance process.

By clicking "Accept" you are agreeing to the [Terms of Service](#)

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

Accept

Reject

[Click to Review our Security & Privacy Policy](#)

[Click to accept enter an Ongoing Relationship with ACME ABC](#)

Regards,
Smart Meter Texas Team

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.

The Smart Meter Texas 3rd Party programs allows consumers to take advantage of products and services offered by 3rd Parties.

Participation in the program is optional and your data will only be released if you, as the consumer, choose to participate. You can choose to opt out at any time.

Please note: Any business relationship is solely between you and the 3rd Party to whom you grant authorization to view your energy data and/or engage in energy management Home Area Networking Services.

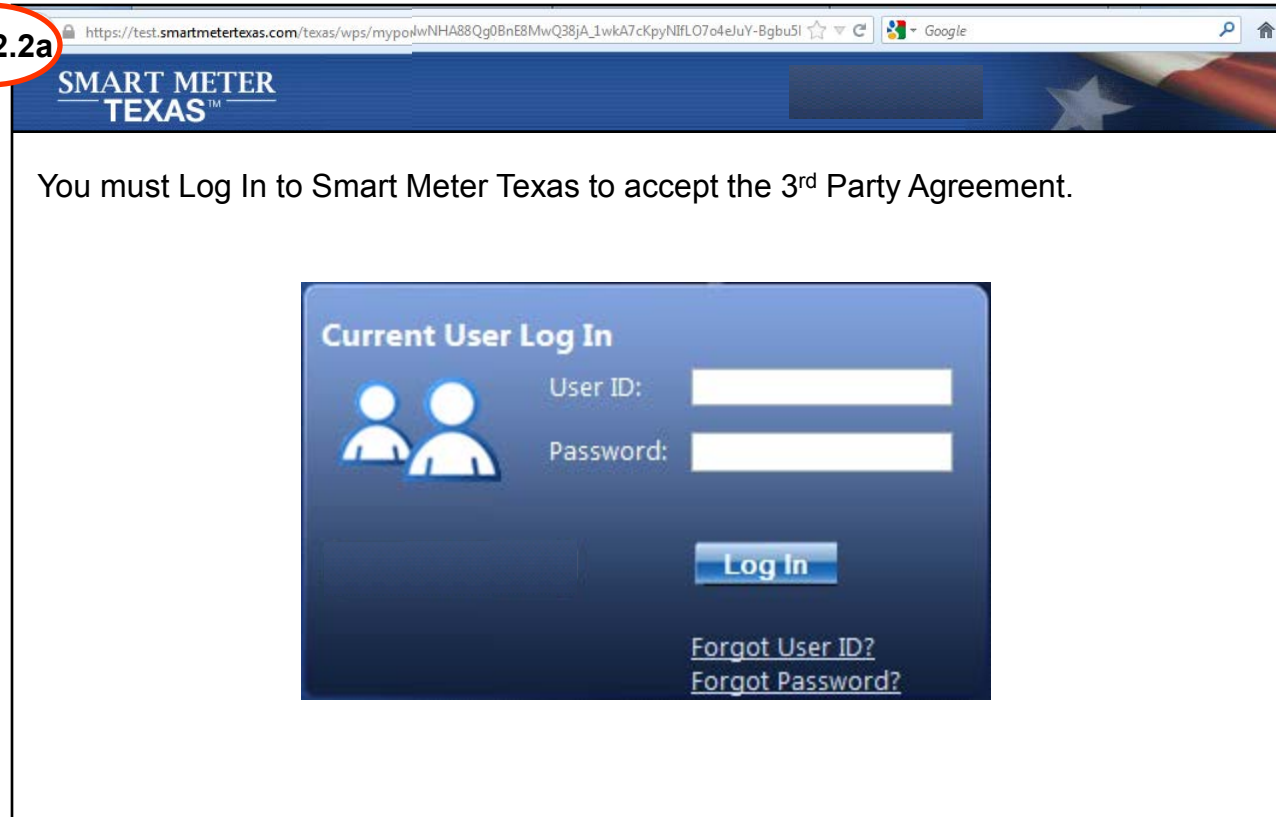
Smart Meter Texas (SMT) records personally identifiable information, such as your service address, meter number, Electric Service Identifier (ESI ID), and 15-minute electricity usage data. By approving this 3rd Party's access to your account, you are granting them permission to access the above data, and to deprovision and send messages to HAN devices, on a continual basis until you revoke access.

You are encouraged to review the privacy statements and policies of parties you choose to give access to your SMT data; so you can understand how those parties collect, use and share your information. Neither SMT, your Transmission/Distribution Service Provider, nor your Retail Electric provider are responsible for the privacy statements, practices, or policies of third parties given access to the SMT data.

Content to be verified by ETF team

Customer Accepts Ongoing Relationship Request: Registered SMT User login page

UI 2.2.2a



Scenario: User is a registered SMT user but has not logged onto SMT
Action: User is prompted to log in after which the agreement is accepted;
 Agreement status is set to Active and user is presented with Congratulations page if login is successful



Relationship accepted
congratulatory page

Customer Accepts Ongoing Relationship Request: Unregistered User prompted to register for SMT account

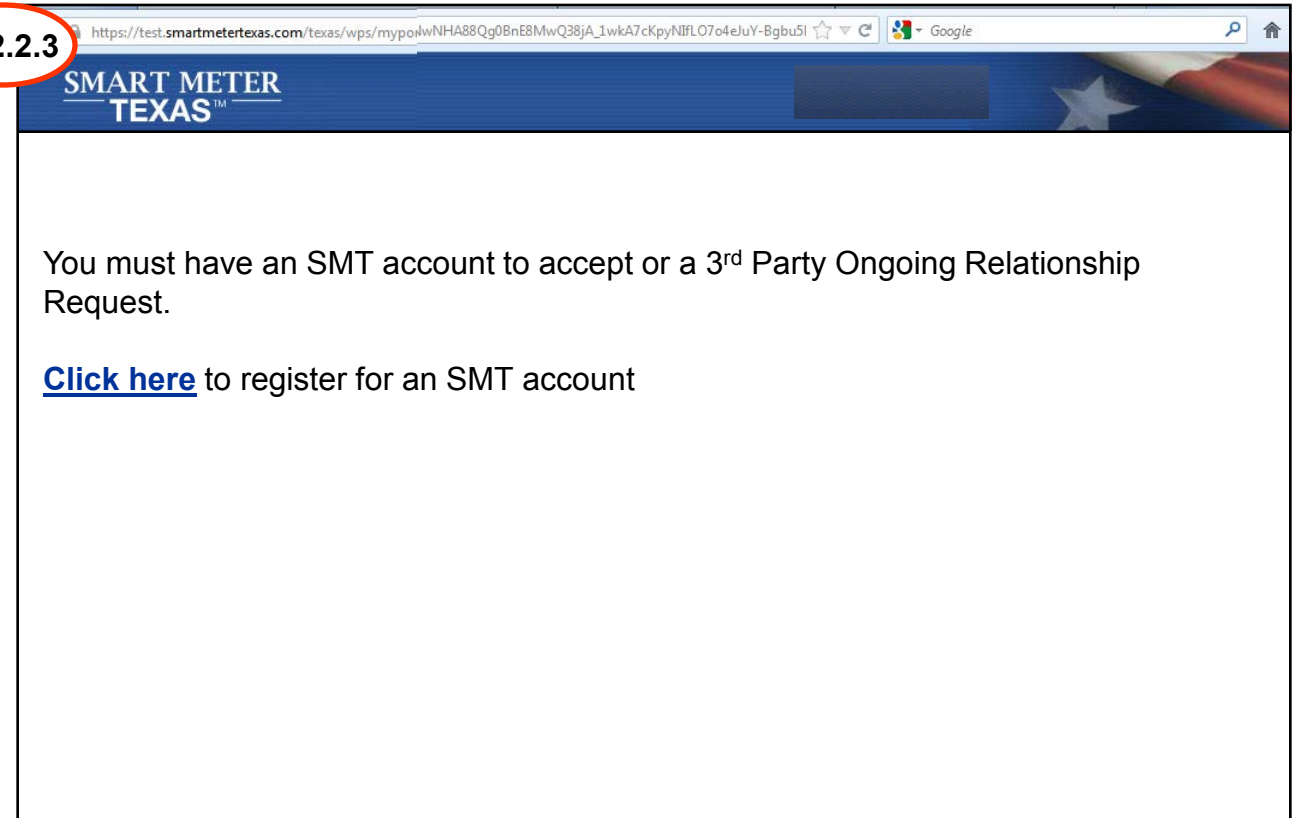
Scenario: User is not a registered SMT user.

Action: User is presented an Ongoing Relationship Acceptance page that takes him through the registration process to complete the acceptance process.

Functional Rule 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

UI 2.2.3



New SMT customer registration process

Customer Rejects Ongoing Relationship Request: Customer Agreement rejected confirmation page

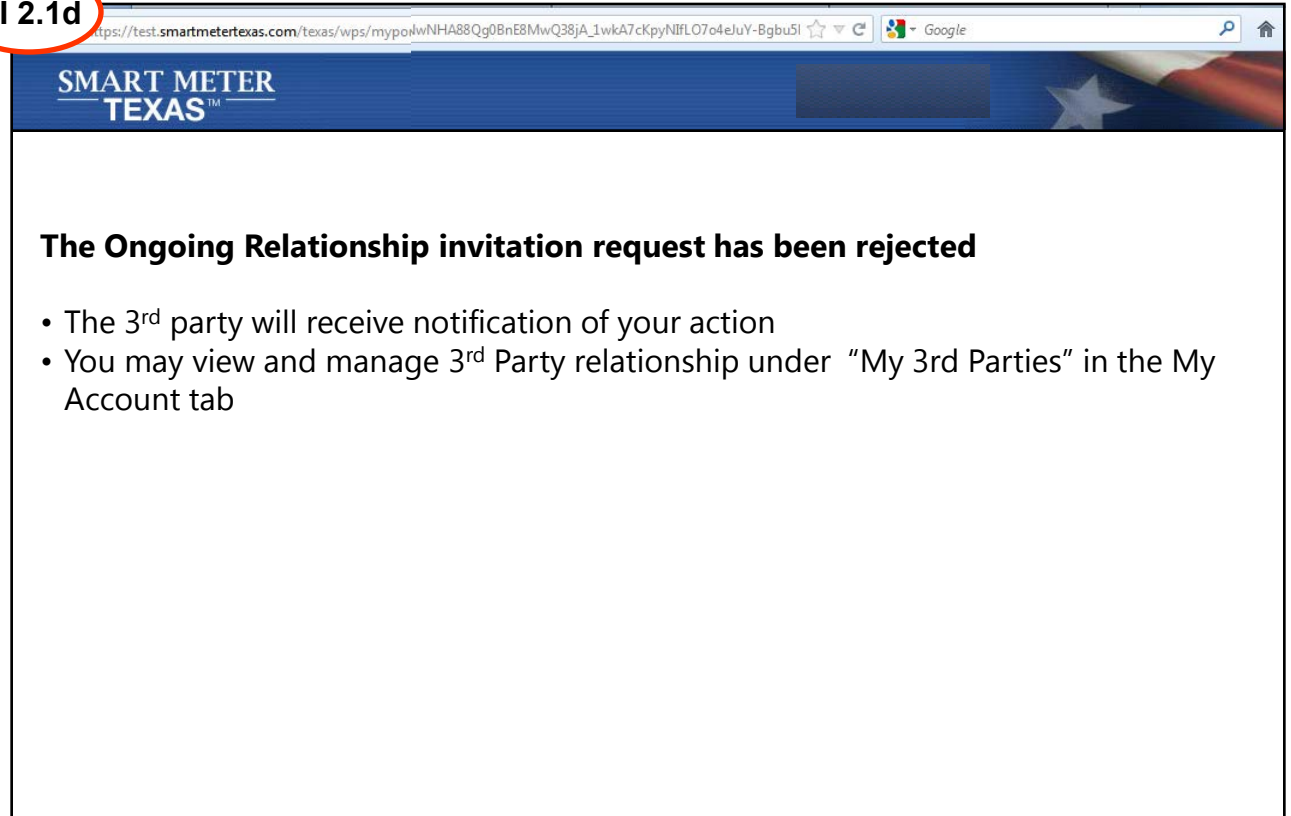
Scenario:

- User clicks “Reject” to an Invitation Request email
- User clicks “Reject” in Extension Request email

Action: Reject Customer Agreement and display confirmation page.

Agreement status is set to Rejected

UI 2.1d



Customer Rejects Ongoing Relationship Request: Customer Agreement rejected confirmation page

Scenario: User is not a registered SMT user.
Action: User is prompted to register for an SMT account to complete the acceptance process.

Functional Rule 7:
SMT will forward user to either a residential or non-residential registration page based on User Information in Customer Agreement initiation request

Functional Rule 8:
Upon completion of registration, User will be presented the View/Edit page of the initiated customer agreement

UI 2.1h

https://test.smartmetertexas.com/texas/wps/myportal/NHA88Qg08nE8MwQ38jA_1wkA7ckpyNifLO7o4eJuY-Bgbu5I

SMART METER
TEXAS™

You must have an SMT account to accept or an Ongoing Relationship for Energy Services.

[Click here](#) to register for an SMT account



New SMT customer registration process

Customer views and manages 3rd Party Agreement

My Account / 3rd Party Relationships landing page – Customer Modifies Agreements

Scenarios:

- In the event that a registered customer bypasses an agreement invitation and goes straight to the pending agreement detail page, they can accept or reject the agreement from that page
- Customers may extend agreements from the customer agreement detail page.
- Customers may terminate agreements from the customer agreement detail page.

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

The screenshot shows a web browser window with the URL [https://test.smartmetertexas.com/...](https://test.smartmetertexas.com/). The page header includes the SMART METER TEXAS logo and a user greeting: "Welcome, Tom Log Out". A navigation bar contains links for Home, My Account, Usage, Notices, and Help. A sidebar menu on the left lists: My Smart Meters, 3rd Party Relationships (highlighted), HAN Devices, My Friend's Meters, My Profile, and My Friends. The main content area is titled "My Account / 3rd Party Relationships" and features a "Search for Customer Agreements" section with a help icon. Below this, there is a legend: a black dot indicates a required field. Instructions state: "Choose your search criteria and type in a one or more search items, OR import a list of search items from a file." A list of search criteria includes Agreement Number(s), 3rd Party Company Name, ESIID(s), Meter Number(s), and MAC Address. A search input field contains "102*" and has a dropdown arrow. Below the input field is an "Or" separator. At the bottom, there is a "*Status:" label, a "Select a Status" dropdown menu, and a "Search" button.

Customer views and manages 3rd Party Agreement: 3rd Party Relationships search results

The screenshot shows a web browser window with the URL <https://test.smartmetertexas.com/>. The page header includes the SMART METER TEXAS logo and a user greeting: "Welcome, Tom Log Out". A navigation bar contains links for Home, My Account, Usage, Notices, and Help. A left sidebar lists navigation options: My Smart Meters, 3rd Party Relationships (highlighted), HAN Devices, My Friend's Meters, My Profile, and My Friends. The main content area is titled "My Account / 3rd Party Relationships" and includes a search icon and pagination information: "Showing 1 - 25 of 501" with page numbers 1, 2, 3, 4, 5 and "Previous" and "Next" buttons. A "View/Edit Agreement" button is positioned above a table of results. The table has columns for Relationship Type, Relationship Agreement #, Start Date, End Date, ESIID, Company Name, and Status. Below the table, another "View/Edit Agreement" button is visible.

	Relationship Type	Relationship Agreement #	Start Date	End Date	ESIID	Company Name	Status
<input type="radio"/>	1-Time Energy	102412000005	10/24/12	10/24/12	1044372...	Global MTRS	Complete
<input type="radio"/>	On Going	102412000123	10/24/12	05/24/13	1093231...	ACME ABC	Active
<input type="radio"/>	1-Time Energy	102512000132	10/25/12	10/25/12	1093231...	iServices	Pending
<input type="radio"/>	HAN Device	102512000137	10/24/12	10/24/12	1008448...	General Fire	Device Added
<input type="radio"/>	HAN Device	102512000149	10/24/12	10/24/12	1034221...	Oni	Add Pending
<input type="radio"/>	1-Time Energy	102512000167	10/24/12	10/24/12	1059643...	Chandra	Rejected
<input type="radio"/>	1-Time Energy	102512000195	10/24/12	10/24/12	1240123...	A1 Energy	Complete
<input type="radio"/>	On Going	102512000233	11/05/12	05/05/13	1004789...	Dallas Meters	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
	HAN Device	102512000457	10/24/12	10/24/12	1009159...	Smith Svcs	Customer Init...

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

Functional Rule 7:

“Accept Agreement” and “Reject Agreement” buttons must be grayed out if Agreement in Active state

Functional Rule 8:

“Terminate Agreement” and “Extend Agreement” buttons must be grayed out if Agreement in Pending state

Functional Rule 9:

If User selects a duration, the “Extend Agreement” button must be come active. Email notification will be sent to 3rd Party and Customers

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

SMART METER TEXAS™ Welcome, Tom Log Out

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

My Smart Meters
3rd Party Relationships
HAN Devices
My Friend's Meters
My Profile
My Friends

My Account / 3rd Party Relationships / View & Edit Customer Agreement

View & Edit Customer Agreement ?

Company Information

Company Name: Green Energy Services
Company Phone: 244-322-5454
Company 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: Ongoing Agreement Energy Data
Agreement Status: Active
Agreement Start Date: 01/01/2012
Agreement End Date: 12/31/2012

Relationship Duration:

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Customer views and manages 3rd Party Agreements Agreement modification confirmation page

The screenshot shows a web browser window with the URL [https://test.smartmetertexas.com/...](https://test.smartmetertexas.com/). The page header features the "SMART METER TEXAS" logo on the left and "Welcome, Tom Log Out" on the right. A green navigation bar contains links for "Home | My Account | Usage | Notices | Help". A left sidebar menu lists "My Smart Meters", "3rd Party Relationships" (highlighted in orange), "HAN Devices", "My Friend's Meters", "My Profile", and "My Friends". The main content area displays a breadcrumb trail: "My Account / [My 3rd Parties](#) / [Edit Agreement](#) / Agreement Edit Successful". Below this, a bold heading reads "3rd Party Relationship Modification Successful". The message states: "You have successfully modified the agreement" and lists two bullet points: "• You will receive a confirmation e-mail" and "• The 3rd party will receive notification of your relationship modification".

Ongoing Relationship for Energy or HAN Services – 3rd Party initiates Ongoing Relationship Extension Request

Agreement Expiration Lifecycle Rule

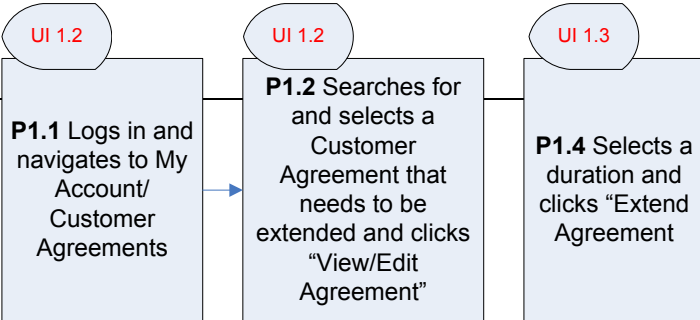
3rd Party Request and Extension of Ongoing Relationship Agreement

3rd Party

GLOBAL BUSINESS RULES:

If an Ongoing Relationship for Energy or HAN Services goes into a "Complete" status, the agreement is permanently closed. A new agreement will need to be established

All 3rd Party agreements are retained for X years after they complete for audit purposes.



Extension Rules:

- 1) User must have permissions to modify the Ongoing Relationship
- 2) The Ongoing Relationship must be in an "Active Status" for the "Extend Relationship" button to be active

Extension Rules:

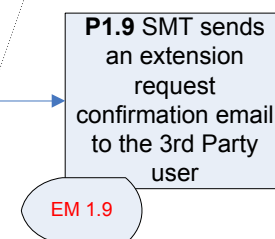
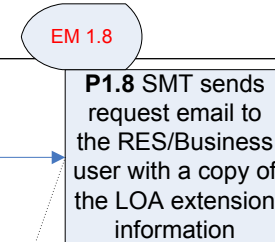
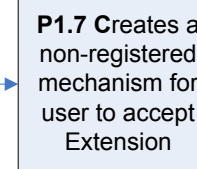
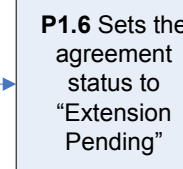
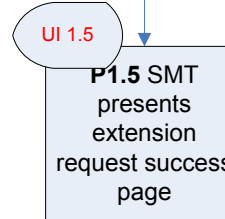
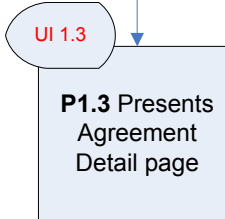
- 1) The "Extend Relationship" is grayed out while the agreement is in "Extended Pending" status

SMT UI

P0.1 - SMT scans all agreements nightly to determine any ongoing agreements that are **30, 14 and 7** days from of expiring

P0.2 SMT sends a Notification Email to Customer that the agreement has are **30, 14 or 7** days remaining until relationship expires **EM 0.2**

P0.3 SMT sends a Notification Email to 3rd Party that the agreement has **30, 14 or 7** days remaining until relationship expires **EM 0.3**



Working assumption for relationship extension duration (from both a customer and 3rd Party perspective) choices:

- X months
- X months
- X months
- X months
- X months

Explanation:

1) SMT will create a public page with a specific URL which contains a Hex code for the particular agreement

2) The Accept & Reject button will have that Hex code embedded in it so that clicking one of them generates the proper response from SMT

Customer (Res, Bus)

GLOBAL BUSINESS RULES:

- 1) The 3rd Party can resend an invite while the agreement is in "Extension Pending" status, but this does not restart the **30** acceptance window.

3rd Party requests extension to Ongoing Customer Agreement: My Account / Customer Agreements page

UI 1.1 <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,
OR import a list of search items from a file.

* Select type of agreement search criteria.

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

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

102*

Search

Create a new agreement:

- Ongoing Relationship for Energy Data
- Ongoing Relationship for HAN Services
- Ad Hoc Energy Data
- Add HAN Device

3rd Party requests extension to Ongoing Customer Agreement: Search results

This is the previous page scrolled down to see the Search Results.

UI 1.2

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

SMART METER TEXAS™

Welcome, Tom
Log Out

Home | My Account | Usage | Notices | Help

Manage Users
Pending Approvals

Search

Showing 1 – 25 of 501 1 2 3 4 5 ← Previous | Next →

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"/>	1-Time Energy	102412000005	10/24/12	10/24/12	1044372...	Wang	Pending
<input checked="" type="radio"/>	On Going	102412000123	10/24/12	05/24/13	1093231...	Akin	Complete
<input type="radio"/>	1-Time Energy	102512000132	10/25/12	10/25/12	1093231...	Gowan	Pending
<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"/>	1-Time Energy	102512000167	10/24/12	10/24/12	1059643...	Chandra	Rejected
<input type="radio"/>	1-Time Energy	102512000195	10/24/12	10/24/12	1240123...	Adebayo	Complete
<input type="radio"/>	On Going	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
	HAN Device	102512000457	10/24/12	10/24/12	1009159...	Smith	Customer Init...

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

Create a new agreement:

Ongoing Relationship for Energy Data | Ongoing Relationship for HAN Services

Ad Hoc Energy Data | Add HAN Device

3rd Party requests extension to Ongoing Customer Agreement: View & Edit Agreement page

UI 1.3

Business Rule 1:

3rd Party can resend an extension request within 14 day window while agreement is in Extension pending status

Business Rule 2:

SMT will send scan agreements daily and email customers of all agreements that are 30 days from expiration

Business Rule 3:

SMT will send scan agreements daily and email 3rd parties of all agreements that are 30 days from expiration

Functional Rule 10:

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

Functional Rule 11:

Extend Agreement, Resend Email and Terminate Agreement buttons will be active only if the agreement is in a suitable state

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: Ongoing Relationship for Energy Services

Agreement Status: Active

Agreement Start Date: 01/01/2012

Agreement End Date: 12/31/2012

Relationship Duration: Select Duration

View Premise Information View Meter Information Export Information View Usage

Extend Agreement Resend Email Terminate Agreement Cancel

3rd Party requests extension to Ongoing Customer Agreement: Extension Request submitted page

UI 1.5

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

SMART METER
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Welcome, Tom
Log Out

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

My Smart Meters
3rd Party Relationships
HAN Devices
My Friend's Meters
My Profile
My Friends

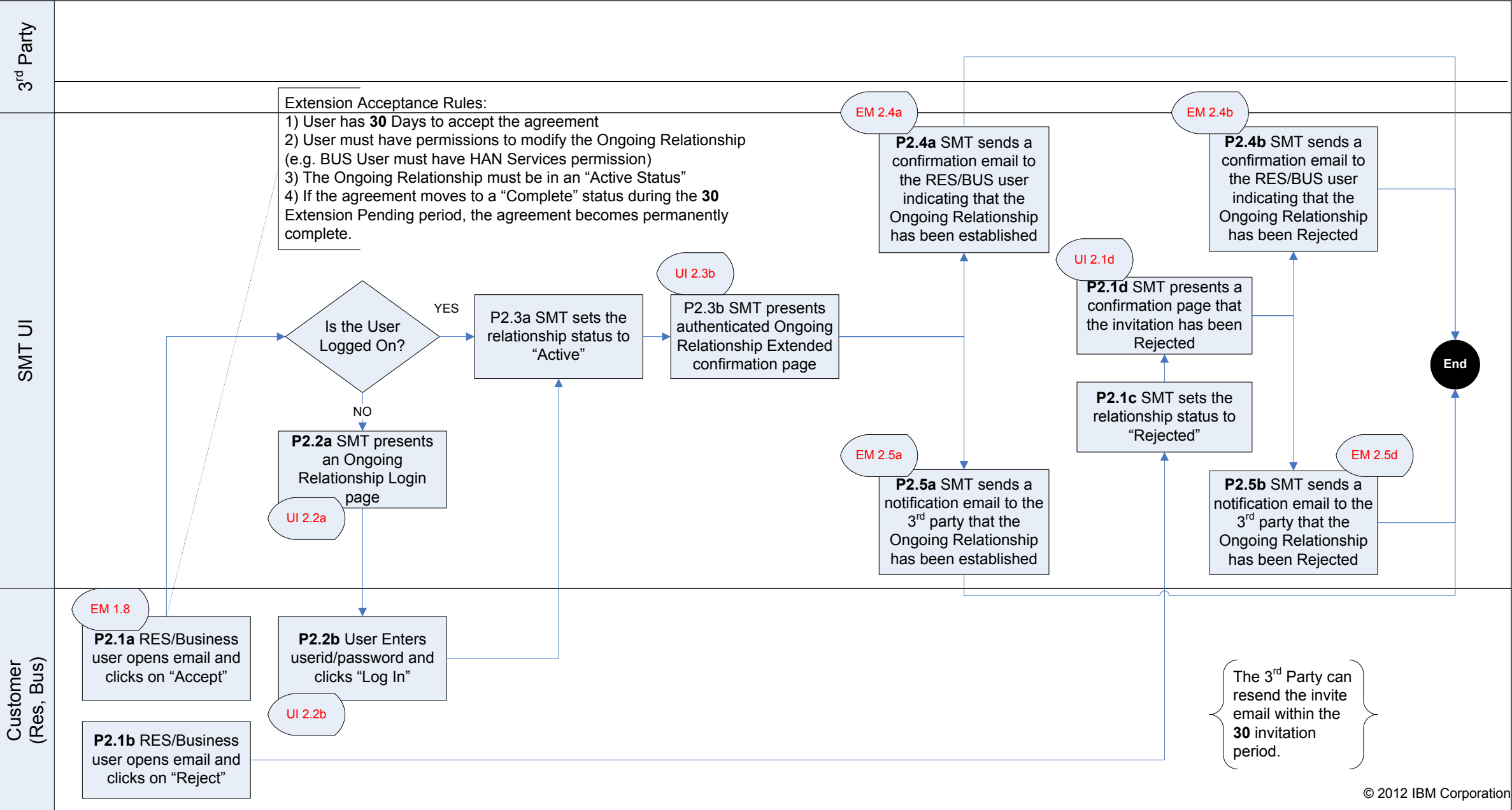
[3rd Party Agreements](#) / Ongoing Relationship Extension Accepted

Ongoing Customer Relationship Extension Request Successful

Your 3rd Party relationship extension request has been submitted

- You will receive a confirmation e-mail
- The customers ESIID status has been updated on your Pending Acceptance list
- The customer will receive an e-mail with a link to accept the relationship extension
- An e-mail will be sent to you once the extension has been accepted

Ongoing Relationship for Energy or HAN Services – Customer Accepts 3rd Party Request for Ongoing Relationship Agreement Extension



Customer Accepts Ongoing Relationship Request

Customer Receives Relationship Request

EM 1.8

Smart Meter Texas 3rd Party Invitation for Ongoing Energy Services
SMTAdmin to: James J Cochran 04/04/2012 04:44 PM
[Hide Details](#)

SMTAdmin@smartmetertexas.com
James J Cochran/Kansas City/IBM@IBMUS


SMART METER TEXAS™

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

ACME123 ABC Request to Extend Ongoing Relationship for Energy Services

ACME ABC has sent you an request to extend Ongoing Relationship for Energy Services Agreement #: XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name:	Chika
Customer Middle Initial:	
Customer Last Name:	Akin
Customer Address:	23 Oxford Street Dallas, TX 987654
Customer Email Address:	cakin@gmail.com
Customer Phone #:	000-000-0000
Language Preference:	English
ESIID:	XXXXXXXXXXXX3404378
Meter Number:	1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

ACME ABC has affirmed that you have given them permissions under this Letter of Authorization to perform the indicated services.

Customer Accepts Ongoing Relationship Request

Customer Receives Relationship Request

EM 1.8

You have 14 calendars days to accept this invitation. After 14 days, the invitation will be voided. Please click "Accept" to complete the acceptance process.

clicking "Accept" you are agreeing to the [Terms of Service](#)

Accept

Reject

[Click to Review our Security & Privacy Policy](#)

[Click to accept enter an Ongoing Relationship with ACME ABC](#)

Regards,
Smart Meter Texas Team

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.

Content to be reviewed and approved by the ETF

The Smart Meter Texas 3rd Party programs allows consumers to take advantage of products and services offered by 3rd Parties.

Participation in the program is optional and your data will only be released if you, as the consumer, choose to participate. You can choose to opt out at any time.

Please note: Any business relationship is solely between you and the 3rd Party to whom you grant authorization to view your energy data and/or engage in energy management Home Area Networking Services.

Smart Meter Texas (SMT) records personally identifiable information, such as your service address, meter number, Electric Service Identifier (ESI ID), and 15-minute electricity usage data. By approving this 3rd Party's access to your account, you are granting them permission to access the above data, and to deprovision and send messages to HAN devices, on a continual basis until you revoke access.

You are encouraged to review the privacy statements and policies of parties you choose to give access to your SMT data; so you can understand how those parties collect, use and share your information. Neither SMT, your Transmission/Distribution Service Provider, nor your Retail Electric provider are responsible for the privacy statements, practices, or policies of third parties given access to the SMT data.

Customer Accepts Ongoing Relationship Extension Request: Customer Agreement extension confirmation page

Scenario: User is a registered SMT user and has already logged into SMT
Action: Accept Customer Agreement and display congratulations page.
 Customer Agreement status is set to Active

UI 2.3b

The screenshot shows a web browser window with the URL <https://test.smartmetertexas.com/...>. The page header includes the SMART METER TEXAS logo and a user greeting: "Welcome, Tom Log Out". A navigation bar contains links for Home, My Account, Usage, Notices, and Help. A left sidebar menu lists: My Smart Meters, 3rd Party Relationships (highlighted), HAN Devices, My Friend's Meters, My Profile, and My Friends. The main content area displays the following:

[3rd Party Agreements](#) / Ongoing Relationship Extension Accepted

Congratulations! Your Ongoing Relationship agreement has been successfully extended.

- The 3rd party will receive notification of your action.
- Your extended relationship with can be viewed and managed under "My 3rd Parties" in the My Account tab

Customer Rejects Ongoing Relationship Extension Request: Customer Agreement extension request rejected confirmation page

Scenario: User is a registered SMT user and has already logged into SMT and clicks “Reject” in Extension Request email:

Action: Reject Agreement extension request and display confirmation page.
Agreement status is set to Active

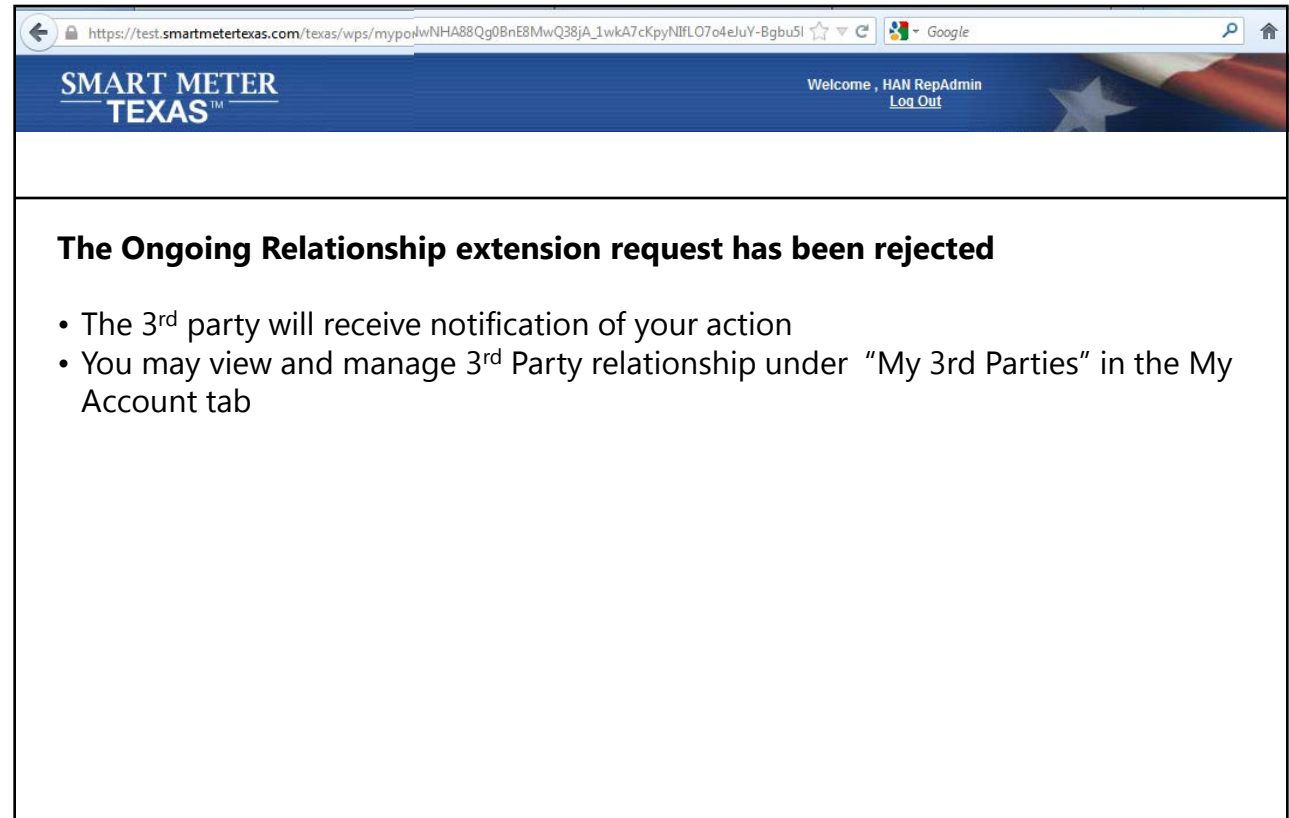


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Functional Design

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User Interface & Scenario Analysis – Ongoing Energy Services



User Interface & Scenario Analysis – Ongoing HAN Services

3rd Party initiates Ongoing Relationship

Customer accepts or rejects Ongoing Relationship

Customer views and manages Ongoing Relationships

3rd Party requests Extension to an Ongoing Relationship

Customer accepts or rejects Ongoing Relationship Extension Request

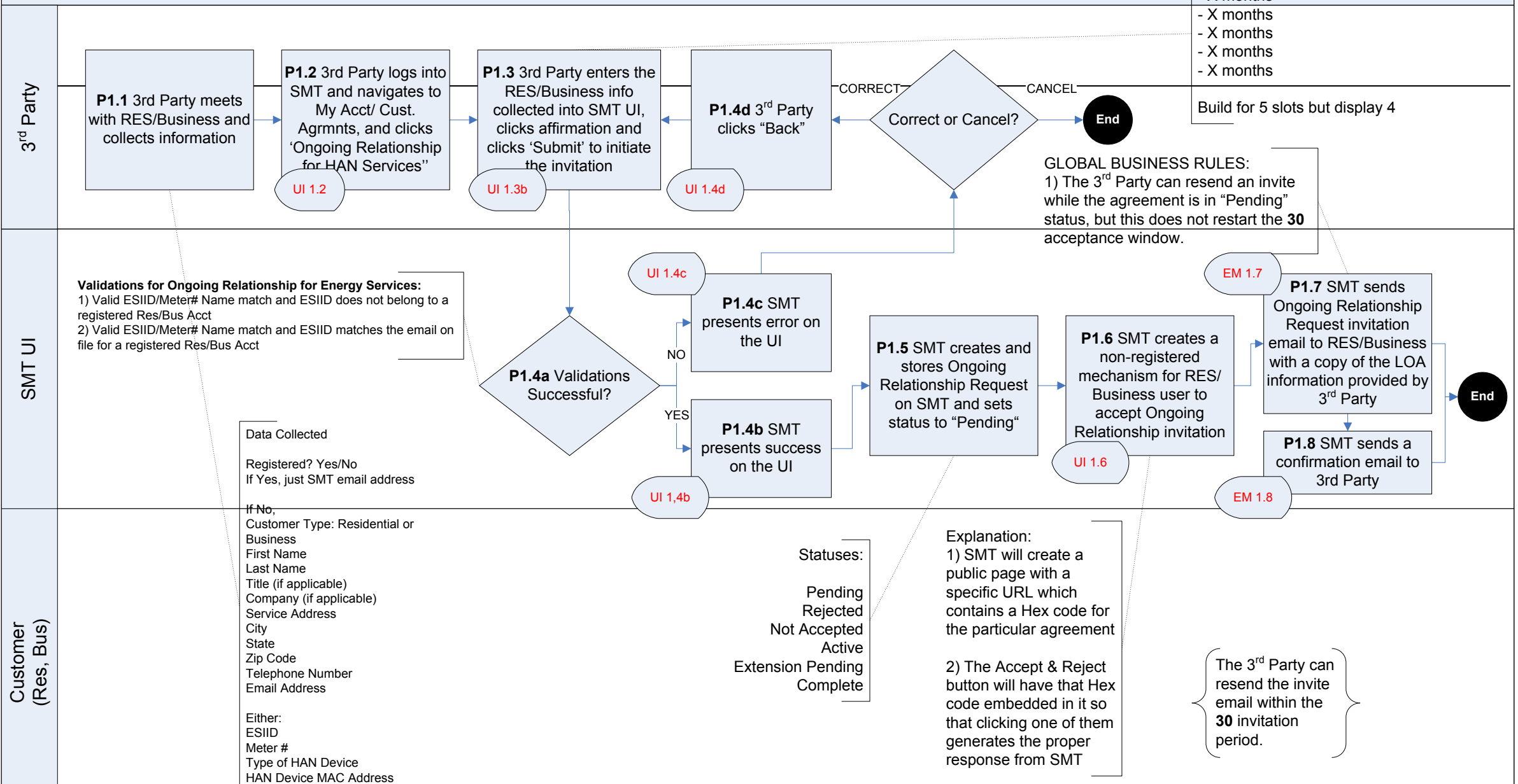
Emails to Customers and 3rd Parties

[...]

Ongoing Relationship for HAN Services – 3rd Party initiates Ongoing Relationship with Customer

Working assumption for relationship duration choices:
 - X months
 - X months
 - X months
 - X months

Build for 5 slots but display 4



GLOBAL BUSINESS RULES:
 1) The 3rd Party can resend an invite while the agreement is in "Pending" status, but this does not restart the 30 acceptance window.

Validations for Ongoing Relationship for Energy Services:
 1) Valid ESIID/Meter# Name match and ESIID does not belong to a registered Res/Bus Acct
 2) Valid ESIID/Meter# Name match and ESIID matches the email on file for a registered Res/Bus Acct

Statuses:
 Pending
 Rejected
 Not Accepted
 Active
 Extension Pending
 Complete

Explanation:
 1) SMT will create a public page with a specific URL which contains a Hex code for the particular agreement
 2) The Accept & Reject button will have that Hex code embedded in it so that clicking one of them generates the proper response from SMT

The 3rd Party can resend the invite email within the 30 invitation period.

3rd Party initiates Ongoing Customer Relationship for HAN services: Initiate Ongoing Customer Agreement (page 1 of 2)

UI 1.3b

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

Customer Agreements

- HAN Device Messages
- My Profile
- Company Profile
- Manage Users
- Pending Approvals

[Customer Agreements](#) / Create Ongoing Relationship for Energy Services

Initiate Ongoing Relationship for HAN Services

- Provide the following information to obtain access to this website. 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

- *Is customer already registered with SMT? Yes? No?
- *Is customer a residential or business user? Yes? No?

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	Device Type	MAC Address
*Device 1:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Device 2:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Device 3:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

*Relationship Duration:

- X months
- X months
- X months
- X months

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 may enter multiple meters or devices during customer agreement initiation, SMT will create separate agreements for each meter or device

Validation:

ESIID/Meter#/MAC Address combination 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 MAC Address specified is not correct
- 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

3rd Party initiates Ongoing Customer Relationship for HAN services: Initiate Ongoing Customer Agreement (page 2 of 2)

UI 1.3b

Functional Rule 4:

Company Name field with 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

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

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.

Create Agreement Cancel

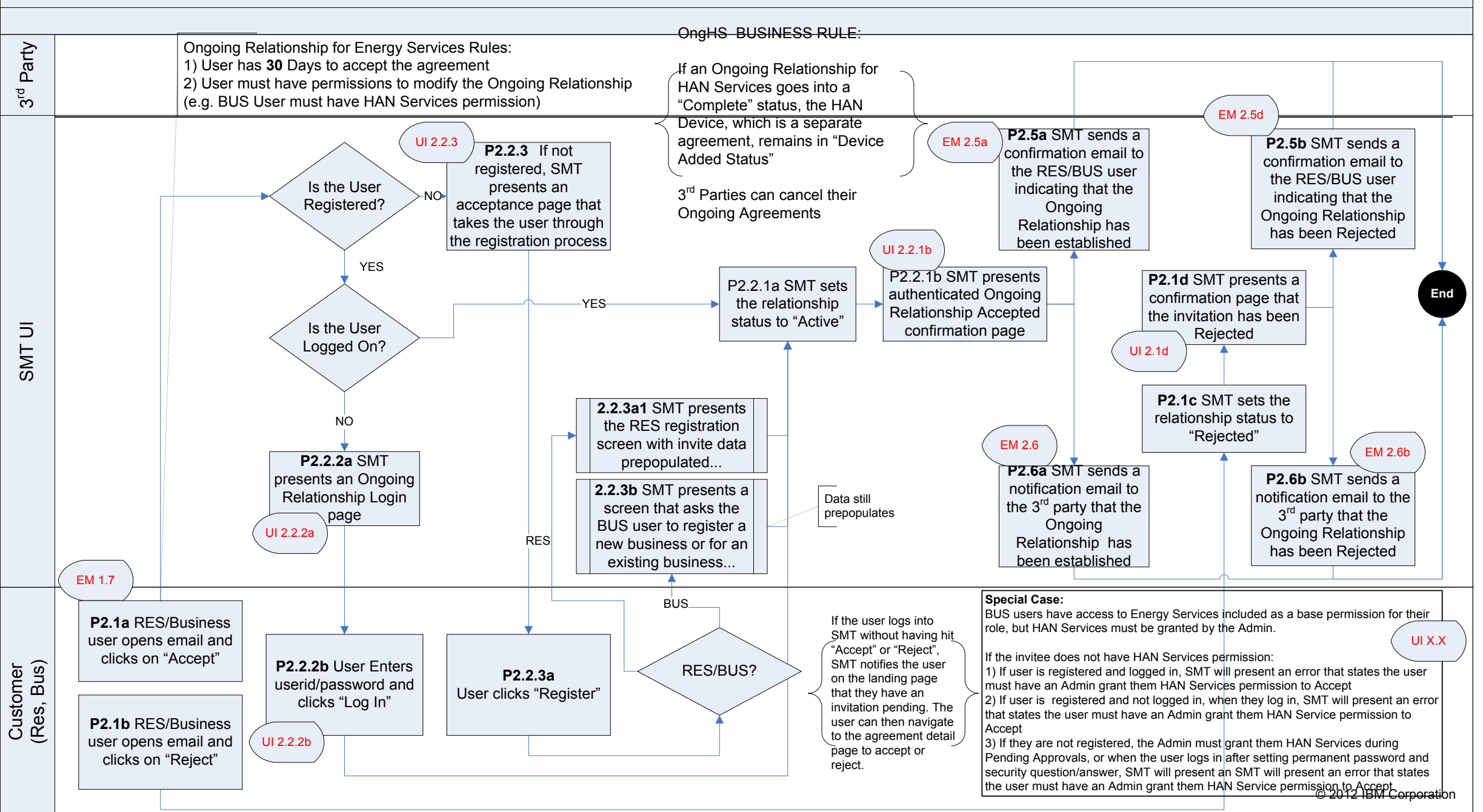
3rd Party initiates Ongoing Customer Relationship for HAN services: Customer Agreement initiated confirmation page

Customer Agreement is created status is set to Pending

UI 1.4b

The screenshot shows a web browser window with the URL <https://test.smartmetertexas.com/>. The page header includes the Smart Meter Texas logo and a user greeting: "Welcome, Tom Log Out". A navigation bar contains links for "Home | My Account | Usage | Notices | Help". The main content area features a left-hand menu with "Customer Agreements" highlighted, listing "HAN Device Messages", "My Profile", "Company Profile", "Manage Users", and "Pending Approvals". The main heading is "Ongoing Relationship for HAN Services Request Successful". Below this, a message states: "Your customer relationship initiation has been submitted" followed by a bulleted list: "• You will receive a confirmation e-mail", "• The customers ESID has been added to your Pending Acceptance list", "• The customer will receive an e-mail with a link to accept the invitation", and "• An e-mail will be sent to you once the invitation has been accepted".

Ongoing Relationship for HAN Services – Customer Accepts 3rd Party Invite for Ongoing Relationship



Customer Accepts 3rd Party Invite for Ongoing Relationship for HAN Services: Customer Receives Email (1 of 2)

EM 1.7

Smart Meter Texas 3rd Party Invitation for Ongoing HAN Services
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!

ACME123 ABC invitation for Ongoing HAN Services

ACME ABC has sent you an invitation to initiate an Ongoing Relationship for HAN services.
Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe

Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name:	Chika
Customer Middle Initial:	
Customer Last Name:	Akin
Customer Address:	23 Oxford Street Dallas, TX 987654
Customer Email Address:	cakin@gmail.com
Customer Phone #:	000-000-0000
Language Preference:	English
ESIID:	XXXXXXXXXXXX3404378
Meter Number:	1024330002321

Requested Services:
-Ongoing Relationship for HAN Services
Date and Time: 03/12/12, 12:05:01

ACME ABC has affirmed that you have given them permissions under this Letter of Authorization to perform the indicated services.

Content to be verified by ETF team

Customer Accepts 3rd Party Invite for Ongoing Relationship for HAN Services: Customer Receives Email (2 of 2)

EM 1.7 You have 14 calendar days to accept this invitation. After 14 days, the invitation will be voided. Please click "Accept" to complete the acceptance process.

By clicking "Accept" you are agreeing to the [Terms of Service](#)

[Accept](#)
[Click to accept enter an Ongoing Relationship with ACME ABC](#)

[Reject](#)

[Click to Review our Security & Privacy Policy](#)

Regards,
Smart Meter Texas Team

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.

To be creates by the ETF

The Smart Meter Texas 3rd Party programs allows consumers to take advantage of products and services offered by 3rd Parties.

Participation in the program is optional and your data will only be released if you, as the consumer, choose to participate. You can choose to opt out at any time.

Please note: Any business relationship is solely between you and the 3rd Party to whom you grant authorization to view your energy data and/or engage in energy management Home Area Networking Services.

Smart Meter Texas (SMT) records personally identifiable information, such as your service address, meter number, Electric Service Identifier (ESI ID), and 15-minute electricity usage data. By approving this 3rd Party's access to your account, you are granting them permission to access the above data, and to deprovision and send message to HAN devices, on a continual basis until you revoke access.

You are encouraged to review the privacy statements and policies of parties you choose to give access to your SMT data; so you can understand how those parties collect, use and share your information. Neither SMT, your Transmission/Distribution Service Provider, nor your Retail Electric provider are responsible for the privacy statements, practices, or policies of third parties given access to the SMT data.

Customer Accepts 3rd Party Invite for Ongoing Relationship for HAN Services: Customer Accepts Relationship Request

Scenario: User is a registered SMT user and has already logged into SMT
Action: Customer Agreement status is set to Active; SMT displays congratulations page.

The screenshot shows a web browser window with the URL <https://test.smartmetertexas.com/...>. The page header includes the SMART METER TEXAS logo and a user greeting: "Welcome, Tom Log Out". A navigation bar contains links for Home, My Account, Usage, Notices, and Help. The main content area is titled "3rd Party Relationships" and displays a congratulatory message: "Congratulations! You have successfully established an Ongoing HAN Services Relationship agreement". Below the message, two bullet points provide details: "Your newly established relationship with can be viewed and managed under 'My 3rd Parties' in the My Account tab" and "The 3rd party will receive notification of your relationship acceptance". A left-hand sidebar menu lists navigation options: My Smart Meters, 3rd Party Relationships (highlighted), HAN Devices, My Friend's Meters, My Profile, and My Friends.

Customer View a 3rd Party Relationship

SMART METER TEXAS™
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

3rd Party 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:	ACME ABC
Contact Name:	James Wilson
Company Phone:	244-322-5454
Company Email:	info@greenenergy.com

Meter and Device Data

ESIID#:	10443720007574303
Meter#:	104051941
Device Type:	Programmable Thermostat
MAC Address:	01233445443453453

Customer Agreement

Customer Agreement #:	102512000233
Agreement Type:	Ongoing Relationship for HAN Services
Agreement Status:	Pending
Agreement Start Date:	01/01/2012
Agreement End Date:	12/31/2012

Accept Agreement
Reject Agreement
Terminate Agreement
Extend Agreement
Cancel

Browser address bar: <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

[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: Ongoing Relationship for HAN Services
Agreement Status: Active
Agreement Start Date: 01/01/2012
Agreement End Date: 12/31/2012
Relationship Duration: Select Duration

Modified buttons to make relevant to HAN instead of Energy Services

3rd Party Requests Extension to Ongoing Relationship for HAN Services: Agreement Extension Request Confirmation page

The screenshot shows a web browser window with the URL <https://test.smartmetertexas.com/...>. The page header features the Smart Meter Texas logo on the left and a user greeting "Welcome, Tom" with a "Log Out" link on the right. A green navigation bar contains links for "Home", "My Account", "Usage", "Notices", and "Help". A left-hand menu lists "My Smart Meters", "3rd Party Relationships", "HAN Devices", "My Friend's Meters", "My Profile", and "My Friends". The main content area displays a breadcrumb trail: [3rd Party Agreements](#) / [View & Edit Customer Agreement](#) / Extension Request Successful. Below this, a bold heading reads "Ongoing Customer Relationship Extension Request Successful". The message states: "Your customer relationship extension request has been submitted" and lists three bullet points: "You will receive a confirmation e-mail", "The customers ESID status has been updated on your Pending Acceptance list", and "The customer will receive an e-mail with a link to accept the relationship extension". A final bullet point states: "An e-mail will be sent to you once the extension has been accepted".

Customer Accepts Ongoing Relationship Request Extension Request: Customer Receives Extension Request Email

Smart Meter Texas 3rd Party Invitation for Ongoing Energy Services

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!

ACME123 ABC Request to Extend Ongoing Relationship for Energy Services

ACME ABC has sent you an request to extend Ongoing Relationship for Energy Services Agreement #: XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name:	Chika
Customer Middle Initial:	
Customer Last Name:	Akin
Customer Address:	23 Oxford Street Dallas, TX 987654
Customer Email Address:	cakin@gmail.com
Customer Phone #:	000-000-0000
Language Preference:	English
ESIID:	XXXXXXXXXXXX3404378
Meter Number:	1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

ACME ABC has affirmed that you have given them permissions under this Letter of Authorization to perform the indicated services.

Customer Accepts Ongoing Relationship Request Extension Request: Customer Receives Extension Request Email

You have 14 calendar days to accept this invitation. After 14 days, the invitation will be voided. Please click "Accept" to complete the acceptance process.

By clicking "Accept" you are agreeing to the [Terms of Service](#)

Accept
[Click to accept enter an Ongoing Relationship with ACME ABC](#)

Reject

[Click to Review our Security & Privacy Policy](#)

Regards,
Smart Meter Texas Team

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.

The Smart Meter Texas 3rd Party programs allows consumers to take advantage of products and services offered by 3rd Parties.

Participation in the program is optional and your data will only be released if you, as the consumer, choose to participate. You can choose to opt out at any time.

Please note: Any business relationship is solely between you and the 3rd Party to whom you grant authorization to view your energy data and/or engage in energy management Home Area Networking Services.

Smart Meter Texas (SMT) records personally identifiable information, such as your service address, meter number, Electric Service Identifier (ESI ID), and 15-minute electricity usage data. By approving this 3rd Party's access to your account, you are granting them permission to access the above data, and to deprovision and send messages to HAN devices, on a continual basis until you revoke access.

You are encouraged to review the privacy statements and policies of parties you choose to give access to your SMT data; so you can understand how those parties collect, use and share your information. Neither SMT, your Transmission/Distribution Service Provider, nor your Retail Electric provider are responsible for the privacy statements, practices, or policies of third parties given access to the SMT data.

Customer Accepts Ongoing Relationship Request Extension Request: Relationship extension confirmation page

The screenshot shows a Mozilla Firefox browser window with the title "Smart Meter Texas - FAQs - Mozilla Firefox: IBM Edition". The address bar displays "smartmetertexas.com" and the URL "https://www.smartmetertexas.com/CAP/public/home/home_faq.html". The page header features the "SMART METER TEXAS™" logo on the left and a link for "Español" on the right. The main content area contains the following text:

Congratulations! You have successfully accepted an extension for the ongoing relationship agreement.

Your relationship agreement can be viewed and managed under "My 3rd Parties" in the My Account tab . The 3rd party will receive notification of your extension Acceptance.

[Click here](#) to Log In to SMT

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Email to Customer: Invitation to Initiate a 3rd Party Ongoing Relationship

Smart Meter Texas 3rd Party Invitation for Ongoing Energy Services

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!

ACME123 ABC invitation for Ongoing Energy Services

ACME ABC has sent you an invitation to initiate an Ongoing Relationship for energy services. Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name: Chika
Customer Middle Initial:
Customer Last Name: Akin
Customer Address: 23 Oxford Street
Dallas, TX 987654
Customer Email Address: cakin@gmail.com
Customer Phone #: 000-000-0000
Language Preference: English
ESIID: XXXXXXXXXXXX3404378
Meter Number: 1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

ACME ABC has affirmed that you have given them permissions under this Letter of Authorization to perform the indicated services.

You have 14 calendar days to accept this invitation. After 14 days, the invitation will be voided. Please click "Accept" to complete the acceptance process.

By clicking "Accept" you are agreeing to the [Terms of Service](#)

Accept

Reject

[Click to Review our Security & Privacy Policy](#)

[Click to accept enter an Ongoing Relationship with ACME ABC](#)

Regards,
Smart Meter Texas Team

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Email to Customer: Customer Acceptance of Ongoing Relationship Request

Smart Meter Texas Acceptance of 3rd Party Invitation for Ongoing Relationship

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

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to **manage** electricity!

Acceptance of ACME ABC invitation for Ongoing Energy Services

You have accepted an invitation from ACME ABC to initiate an Ongoing Relationship for energy services. Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name: Chika
Customer Middle Initial:
Customer Last Name: Akin
Customer Address: 23 Oxford Street
Dallas, TX 987654
Customer Email Address: cakin@gmail.com
Customer Phone #: 000-000-0000
Language Preference: English
ESIID: XXXXXXXXXXXX3404378
Meter Number: 1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

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Regards,
Smart Meter Texas Team

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Email to Customer: Customer Rejection of Ongoing Relationship Request

Smart Meter Texas Rejection of 3rd Party Invitation for Ongoing Relationship

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

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to **manage** electricity!

Rejection of ACME ABC invitation for Ongoing Energy Services

You have rejected an invitation from ACME ABC to initiate an Ongoing Relationship for energy services. Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name: Chika
Customer Middle Initial:
Customer Last Name: Akin
Customer Address: 23 Oxford Street
Dallas, TX 987654
Customer Email Address: cakin@gmail.com
Customer Phone #: 000-000-0000
Language Preference: English
ESIID: XXXXXXXXXXXX3404378
Meter Number: 1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

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Regards,
Smart Meter Texas Team

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Email to Customer: Customer Initiated Extension Notification of 3rd Party Ongoing Relationship

Smart Meter Texas Extension of 3rd Party Relationship

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

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Extension of Ongoing Relationship for Energy Services with ACME ABC

You have extended your Ongoing Relationship for energy services with ACME ABC. Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name: Chika
Customer Middle Initial:
Customer Last Name: Akin
Customer Address: 23 Oxford Street
Dallas, TX 987654
Customer Email Address: cakin@gmail.com
Customer Phone #: 000-000-0000
Language Preference: English
ESIID: XXXXXXXXXXXX3404378
Meter Number: 1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

ACME ABC has affirmed that you have given them permissions under this Letter of Authorization to perform the indicated services.

Regards,
Smart Meter Texas Team

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The Smart Meter Texas 3rd Party programs allows consumers to take advantage of products and services offered by 3rd Parties.

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Email to Customer: Customer Initiated Cancellation Notification of 3rd Party Ongoing Relationship

Smart Meter Texas Cancellation of 3rd Party Relationship for Ongoing Energy Services

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

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to **manage** electricity!

Cancellation of Ongoing Relationship for Energy Services with ACME ABC

You have cancelled your Ongoing Relationship for energy services with ACME ABC. Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name: Chika
Customer Middle Initial:
Customer Last Name: Akin
Customer Address: 23 Oxford Street
Dallas, TX 987654
Customer Email Address: cakin@gmail.com
Customer Phone #: 000-000-0000
Language Preference: English
ESIID: XXXXXXXXXXXX3404378
Meter Number: 1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

ACME ABC has affirmed that you have given them permissions under this Letter of Authorization to perform the indicated services.

Regards,
Smart Meter Texas Team

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Email to Customer: 3rd Party Initiated Request for Extension of Ongoing Relationship

Smart Meter Texas Extension of 3rd Party Relationship

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
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to **manage** electricity!

Request for Extension of Ongoing Relationship for Energy Services with ACME ABC

ACME ABC has requested an extension of your Ongoing Relationship for energy services. Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name: Chika
Customer Middle Initial:
Customer Last Name: Akin
Customer Address: 23 Oxford Street
Dallas, TX 987654
Customer Email Address: cakin@gmail.com
Customer Phone #: 000-000-0000
Language Preference: English
ESIID: XXXXXXXXXXXX3404378
Meter Number: 1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

ACME ABC has affirmed that you have given them permissions under this Letter of Authorization to perform the indicated services.

You have 14 calendar days to accept this invitation. After 14 days, the invitation will be voided. Please click "Accept" to complete the acceptance process.

By clicking "Accept" you are agreeing to the [Terms of Service](#)

Accept

Reject

[Click to Review our Security & Privacy Policy](#)

[Click to accept enter an Ongoing Relationship with ACME ABC](#)

Regards,
Smart Meter Texas Team

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

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The Smart Meter Texas 3rd Party programs allows consumers to take advantage of products and services offered by 3rd Parties.

Participation in the program is optional and your data will only be released if you, as the consumer, choose to participate. You can choose to opt out at any time.

Please note: Any business relationship is solely between you and the 3rd Party to whom you grant authorization to view your energy data and/or engage in energy management Home Area Networking Services.

Smart Meter Texas (SMT) records personally identifiable information, such as your service address, meter number, Electric Service Identifier (ESI ID), and 15-minute electricity usage data. By approving this 3rd Party's access to your account, you are granting them permission to access the above data, and to deprovision and send messages to HAN devices, on a continual basis until you revoke access.

You are encouraged to review the privacy statements and policies of parties you choose to give access to your SMT data; so you can understand how those parties collect, use and share your information. Neither SMT, your Transmission/Distribution Service Provider, nor your Retail Electric provider are responsible for the privacy statements, practices, or policies of third parties given access to the SMT data.

Email to Customer: 3rd Party Termination Notification Ongoing Relationship

Smart Meter Texas Termination of 3rd Party Relationship for Ongoing Energy Services

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!

Ongoing Relationship for Energy Services with ACME ABC has been terminated

ACME ABC has terminated your Ongoing Relationship for energy services. Agreement # is XXXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name: Chika
Customer Middle Initial:
Customer Last Name: Akin
Customer Address: 23 Oxford Street
Dallas, TX 987654
Customer Email Address: cakin@gmail.com
Customer Phone #: 000-000-0000
Language Preference: English
ESIID: XXXXXXXXXXXXX3404378
Meter Number: 1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

ACME ABC has affirmed that you have given them permissions under this Letter of Authorization to perform the indicated services.

Regards,
Smart Meter Texas Team

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Email to Customer: Customer Acceptance of Request for Extension of Ongoing Relationship

Smart Meter Texas Acceptance of Request for Extension of 3rd Party Ongoing Relationship

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

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Acceptance of ACME ABC invitation for Ongoing Energy Services

You have accepted a request from ACME ABC to extend an Ongoing Relationship for energy services. Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name: Chika
Customer Middle Initial:
Customer Last Name: Akin
Customer Address: 23 Oxford Street
Dallas, TX 987654
Customer Email Address: cakin@gmail.com
Customer Phone #: 000-000-0000
Language Preference: English
ESIID: XXXXXXXXXXXX3404378
Meter Number: 1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

ACME ABC has affirmed that you have given them permissions under this Letter of Authorization to perform the indicated services.

Regards,
Smart Meter Texas Team

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Email to Customer: Customer Rejection of Request for Extension of Ongoing Relationship Request

Smart Meter Texas Rejection of Request to extend Ongoing 3rd Party Relationship

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



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to **manage** electricity!

Rejection of ACME ABC request to extend Ongoing Energy Services

You have rejected a request from ACME ABC to extend an Ongoing Relationship for energy services. Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name: Chika
Customer Middle Initial:
Customer Last Name: Akin
Customer Address: 23 Oxford Street
Dallas, TX 987654
Customer Email Address: cakin@gmail.com
Customer Phone #: 000-000-0000
Language Preference: English
ESIID: XXXXXXXXXXXX3404378
Meter Number: 1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

ACME ABC has affirmed that you have given them permissions under this Letter of Authorization to perform the indicated services.

Regards,
Smart Meter Texas Team

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Email to 3rd Party: Invitation to Initiate a 3rd Party Ongoing Relationship with Customer

Smart Meter Texas 3rd Party Invitation for Ongoing Energy Services

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

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Invitation to Chika Akin to initiate relationship for Ongoing Energy Services

You have sent Chika Akin an invitation to initiate an Ongoing Relationship for energy services. Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name:	Chika
Customer Middle Initial:	
Customer Last Name:	Akin
Customer Address:	23 Oxford Street Dallas, TX 987654
Customer Email Address:	cakin@gmail.com
Customer Phone #:	000-000-0000
Language Preference:	English
ESIID:	XXXXXXXXXXXX3404378
Meter Number:	1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

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Regards,
Smart Meter Texas Team

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Email to 3rd Party: Customer Acceptance of Ongoing Relationship Request

Smart Meter Texas Acceptance of 3rd Party Invitation for Ongoing Relationship

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

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Chika Akin Acceptance of Invitation for Ongoing Energy Services

Chika Akin has accepted your invitation to initiate an Ongoing Relationship for energy services. Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name: Chika
Customer Middle Initial:
Customer Last Name: Akin
Customer Address: 23 Oxford Street
Dallas, TX 987654
Customer Email Address: cakin@gmail.com
Customer Phone #: 000-000-0000
Language Preference: English
ESIID: XXXXXXXXXXXX3404378
Meter Number: 1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

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Email to 3rd Party: Customer Rejection of Ongoing Relationship Request

Smart Meter Texas Rejection of 3rd Party Invitation for Ongoing Relationship

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

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Chika Akin Rejection of Invitation for Ongoing Energy Services

Chika Akin has rejected your invitation to initiate an Ongoing Relationship for energy services. Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name: Chika
Customer Middle Initial:
Customer Last Name: Akin
Customer Address: 23 Oxford Street
Dallas, TX 987654
Customer Email Address: cakin@gmail.com
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Email to 3rd Party: Customer Initiated Extension of 3rd Party Ongoing Relationship

Smart Meter Texas Extension of 3rd Party Relationship

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



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Chika Akin Extension of Ongoing Relationship for Energy Services

Chika Akin has extended your Ongoing Relationship for energy services. Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name: Chika
Customer Middle Initial:
Customer Last Name: Akin
Customer Address: 23 Oxford Street
Dallas, TX 987654
Customer Email Address: cakin@gmail.com
Customer Phone #: 000-000-0000
Language Preference: English
ESIID: XXXXXXXXXXXX3404378
Meter Number: 1024330002321

Requested Services:
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Date and Time: 03/12/12, 12:05:01

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Email to 3rd Party: Customer Initiated Cancellation of 3rd Party Ongoing Relationship

Smart Meter Texas Cancellation of 3rd Party Relationship for Ongoing Energy Services

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

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Chika Akin Cancellation of Ongoing Relationship for Energy Services

Chika Akin has cancelled your Ongoing Relationship for energy services.
Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name:	Chika
Customer Middle Initial:	
Customer Last Name:	Akin
Customer Address:	23 Oxford Street Dallas, TX 987654
Customer Email Address:	cakin@gmail.com
Customer Phone #:	000-000-0000
Language Preference:	English
ESIID:	XXXXXXXXXXXX3404378
Meter Number:	1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

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Email to 3rd Party: 3rd Party Initiated Request for Extension of Ongoing Relationship

Smart Meter Texas Extension of 3rd Party Relationship

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



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Request for Extension of Ongoing Relationship for Energy Services with Chika Akin

You have requested an extension of your Ongoing Relationship for energy services with Chika Akin. Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name: Chika
Customer Middle Initial:
Customer Last Name: Akin
Customer Address: 23 Oxford Street
Dallas, TX 987654
Customer Email Address: cakin@gmail.com
Customer Phone #: 000-000-0000
Language Preference: English
ESIID: XXXXXXXXXXXX3404378
Meter Number: 1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

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Email to 3rd Party: 3rd Party Termination Notification Ongoing Relationship

Smart Meter Texas Termination of 3rd Party Relationship for Ongoing Energy Services

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

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Termination of Ongoing Relationship for Energy Services with Chika Akin

You have terminated your Ongoing Relationship for energy services with Chika Akin. Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name: Chika
Customer Middle Initial:
Customer Last Name: Akin
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Dallas, TX 987654
Customer Email Address: cakin@gmail.com
Customer Phone #: 000-000-0000
Language Preference: English
ESIID: XXXXXXXXXXXX3404378
Meter Number: 1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
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Email to 3rd Party: Customer Acceptance of Request for Extension of Ongoing Relationship

Smart Meter Texas Acceptance of Request for Extension of 3rd Party Ongoing Relationship

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



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Chika Akin Acceptance of Request for Extension of Ongoing Energy Services

Chika Akin has accepted your request to extend your Ongoing Relationship for energy services. Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

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Customer Middle Initial:
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Customer Email Address: cakin@gmail.com
Customer Phone #: 000-000-0000
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Regards,
Smart Meter Texas Team

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.

The Smart Meter Texas 3rd Party programs allows consumers to take advantage of products and services offered by 3rd Parties.

Participation in the program is optional and your data will only be released if you, as the consumer, choose to participate. You can choose to opt out at any time.

Please note: Any business relationship is solely between you and the 3rd Party to whom you grant authorization to view your energy data and/or engage in energy management Home Area Networking Services.

Smart Meter Texas (SMT) records personally identifiable information, such as your service address, meter number, Electric Service Identifier (ESI ID), and 15-minute electricity usage data. By approving this 3rd Party's access to your account, you are granting them permission to access the above data, and to deprovision and send messages to HAN devices, on a continual basis until you revoke access.

You are encouraged to review the privacy statements and policies of parties you choose to give access to your SMT data; so you can understand how those parties collect, use and share your information. Neither SMT, your Transmission/Distribution Service Provider, nor your Retail Electric provider are responsible for the privacy statements, practices, or policies of third parties given access to the SMT data.

Email to 3rd Party: Customer Rejection of Request for Extension of Ongoing Relationship Request

Smart Meter Texas Rejection of Request to extend Ongoing 3rd Party Relationship

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!

Rejection of ACME ABC request to extend Ongoing Energy Services

Chika Akin has rejected your request for extension of your Ongoing Relationship for energy services. Agreement # is XXXXXXXXXXXX.

3rd Party Name: ACME ABC
3rd Party Email: customerservice@acmeabc.com
3rd Party Phone Number: 888-555-1212
3rd Party Contact: John Doe



Comments: lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem

Customer First Name: Chika
Customer Middle Initial:
Customer Last Name: Akin
Customer Address: 23 Oxford Street
Dallas, TX 987654
Customer Email Address: cakin@gmail.com
Customer Phone #: 000-000-0000
Language Preference: English
ESIID: XXXXXXXXXXXX3404378
Meter Number: 1024330002321

Requested Services:
-Ongoing Relationship for Energy Data
Date and Time: 03/12/12, 12:05:01

ACME ABC has affirmed that you have given them permissions under this Letter of Authorization to perform the indicated services.

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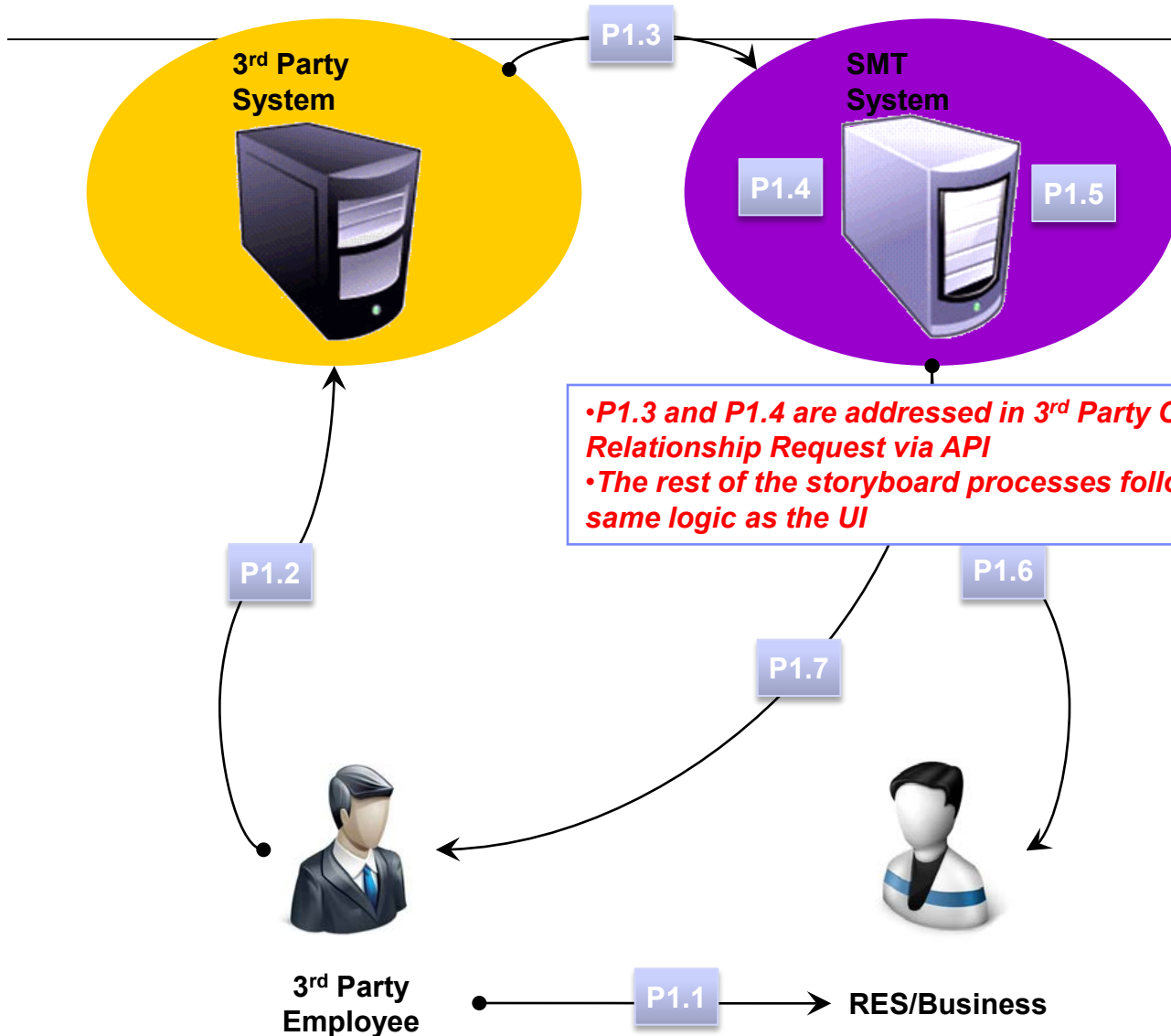
Solution Design

Issues and Resolutions

Functional Design: 3rd Party Ongoing Relationship Request via API

3rd Party Ongoing Relationship Request via API

3rd Party Ongoing Relationship Request via API



Storyboard Process

- P1.1** 3rd Party Employee meets with RES/Business customer and collects information (3rd Party)
- P1.2** 3rd Party Employee follows 3rd Party Ongoing Relationship Request processes (3rd Party)
- P1.3** 3rd Party System sends SMT an Ongoing Relationship Request via API (3rd Party)
- P1.4** If validations are successful, SMT creates and stores 3rd Party Ongoing Relationship request on SMT and sets status to "Pending" (3rd Party)
- P1.5** SMT creates a mechanism for RES/Business user to accept the 3rd Party Ongoing Relationship invitation (3rd Party)
- P1.6** SMT sends an 3rd Party Ongoing Relationship Request email to RES/Business user (3rd Party)
- P1.7** SMT sends a confirmation email to 3rd Party (3rd Party)

Notes:

- The process for Customers Accepts 3rd Party Ongoing Relationship Invitation is the same regardless of how the 3rd Party initiates the request
- SMT will follow established API patterns for Acknowledgments and Failures

3rd Party Ongoing Relationships API

Two new SMT APIs will be designed and developed, and made available externally to 3rd Party to allow them to initiate Ongoing Relationship requests via API for the following:

- 3rd Party Ongoing Relationship for Energy Services Request via API
- 3rd Party Ongoing Relationship for HAN Services Request via API

Note: These APIs will be exposed to the 3rd Party entities and will be used for interface / communication between 3rd Party and SMT, including request and response.

3rd Party Ongoing Relationships API

Prerequisites before 3rd Party Users can use 3rd Party Ongoing Relationship APIs

- 3rd Party is a valid registered user of Smart Meter Texas Portal
- 3rd Party has collected Customer Information
 - For customers not yet registered at SMT - 3rd Party has met with RES/BUS users and has collected required customer information
 - For customers registered at SMT - 3rd Party has SMT email addresses

3rd Party System sends SMT an Ongoing Relationship Request via API (3rd Party)

