



PROCEDURE

Market Manual 3: Metering

**Part 3.8: Creating and
Maintaining Delivery
Point Relationships**

Issue 12.0

This procedure details the procedures to be followed by *market participants* to enable the creation and maintenance of *delivery point* relationships, after the *market commencement date*.

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Reference (Section and Paragraph)	Description of Change
Title Page	New logo has been applied to title page.
Section 1.4.1	Removed references to Single Line Diagram forms.
Section 1.6	Added references for transmitters list.
Section 2	Removed paper form references for all procedural workflows.
Appendix A	<p>Removed reference to the following forms:</p> <p>IMO_FORM_1299: Assigning an Registered Market Participant and Metered Market Participant for an Energy Market Resource</p> <p>IMO_FORM_1300: Assigning a Metering Service Provider, a Meter Data Associate and a Distributor for an Energy Market Delivery Point</p> <p>IMO_FORM_1304: Assigning a Metering Service Provider, a Meter Data Associate and a Transmitter for a Transmission Tariff Delivery Point</p> <p>Removed Procedural Workflows 2.1.</p>
Appendix B	Removed references to the email for verification of transmitters list

Market Manuals

The *market manuals* consolidate market procedures and associated forms, standards, and policies that define certain elements relating to the operation of the *IESO-administered markets*. Market procedures provide more detailed descriptions of the requirements for various activities than is specified in the *market rules*. Where there is a discrepancy between the requirements in a document within a *market manual* and the *market rules*, the *market rules* must prevail. Standards and policies appended to, or referenced in, these procedures provide a supporting framework.

Market Procedures

The “Metering Manual” is Volume 3 of the *market manuals*, and this document is “Part 3.8: Creating and Maintaining Delivery Point Relationships”.

A list of the other component parts of the “Metering Manual” is provided in “Part 3.0: Metering Overview”, in Section 2, “About This Manual”.

Structure of Market Procedures

Each market procedure is composed of the following sections:

1. **“Introduction”**, which contains general information about the procedure, including an overview, a description of the purpose and scope of the procedure, and information about roles and responsibilities of the parties involved in the procedure.
2. **“Procedural Work Flow”**, which contains a graphical representation of the steps and flow of information within the procedure.
3. **“Appendices”**, which may include such items as forms, standards, policies, and agreements.

Conventions

The *market manual* standard conventions are as defined in the “Market Manual Overview” document.

– End of Section –

1. Introduction

1.1 Purpose

This procedure describes the steps *market participants* must follow to register and maintain both *energy market* and *transmission tariff delivery points* (DPs).

Registering an *energy market delivery point* is part of *market entry* and the first step in *metering installation* registration (see “Part 3.2: Meter Point Registration and Maintenance”).

Registering a *transmission tariff* (TT) *delivery point* allows the *IESO* to collect transmission charges from *market participants* on behalf of the *transmitter*, as detailed in Section 3.2.

1.2 Scope

This procedure covers the steps to create and maintain *delivery point* relationships. Some of the steps in this procedure are related to, and are part of, procedures for *facilities* and *metering installation* registration not covered in this manual:

- Information about *market entry* can be found in “Market Manual 1: Market Entry, Maintenance, and Exit, Part 1.2: Market entry, Maintenance, and De-registration”.
- Information about *metering installation* registration can be found in Market Manual 3: Metering, Part 3.2: Meter Point Registration and Maintenance” and “Market Manual 3: Metering, Part 3.7: Totalization Table Registration”.

1.3 Overview

This document covers the registration and maintenance of *delivery points* for the *energy market* and *transmission tariffs*.

Energy market delivery points are created during *market entry*, but not accepted until *delivery point* registration is performed in this procedure. After the *delivery point* is accepted, *meter point* registration can proceed (Chapter 6, Section 6.1.2). The *IESO* uses the *delivery point* to settle market transactions with participants.

Transmission tariff delivery points are not created during *market entry*. These *delivery points* are communicated to the *IESO* from the *transmitter*, and are created and accepted in accordance with this procedure. The *IESO* collects *transmission tariffs* on behalf of the *transmitter* (Chapter 10, Section 2.1 of the *market rules*), but is not responsible for the accuracy or integrity of *delivery point* information (Chapter 10, Section 6.1.3.1 of the *market rules*).

For *embedded generators* connected after October 30, 1998 with a unit rating of 1 MW or higher, their *metering installations* will need to be registered by the *transmission customer* with the *IESO* (Refer to “Market Manual 3: Metering, Part 3.2: Meter Point Registration and Maintenance”).

Additional sub-procedures included in this document describe how to change relationships of a *metered market participant* or a *metering service provider* for a *delivery point*.

1.4 Terminology Associated with this Process

During the sub-procedures in this manual, several terms are used by the *IESO* in order to identify physical or logical features related to metering, *settlement* or *transmission tariffs*.

1.4.1 Meter Point ID

This ID identifies the physical location of the *metering installation* with a unique numerical code.

1.4.2 Delivery Point

The *delivery point* is the logical reference point for *settlements* in the wholesale *energy market*, and for the *transmission tariff* market. Totalization tables submitted during MI registration are always associated with a *delivery point*. Separate *delivery points* are created for *transmission tariffs* customers, as described in “Market Manual 3: Metering, Part 3.7: Totalization Table Registration”.

There are two categories of *transmission tariff delivery points*, namely Network *delivery points* and Connection *delivery points*. Network *delivery points* are used to determine charges that load customers must pay for the use of the *transmission system*. Connection *delivery points* are used to determine charges that customers, in addition to paying for the use of the *transmission system*, also pay for the transmission line and/or the step-down transformer through which they are fed.

Separate *delivery points* are created for *transmission customers* of either a Network or Connection type. Totalization tables are submitted for both the Network or Connection *delivery points*.

1.4.3 Metered Market Participant Relationship with the Delivery Point

The *market participant* that registers a *facility* must assign a *metered market participant* for each *delivery point* created in the process. This entitles the *metered market participant* to access *metering data* pertaining to, and to be settled at, the relevant *delivery point* (Chapter 6, Section 10.1.3 of the *market rules*). Also, the appointed *metered market participant* shall assign further relationships required for the complete definition of a *delivery point* as described in Sections 2 and 3.

1.4.4 Metered Market Participant Relationship with a Meter Point

During the process of Meter Point Registration, the *metered market participant* (on whose behalf the *metering service provider* registers the *meter point*) is associated with the newly created *meter point* that uniquely identifies the *metering installation*. This relationship reflects the responsibilities of the *metered market participant* with regard to the *metering installation*.

1.4.5 Metering Service Provider Relationship with a Delivery Point

Once a *metered market participant* has been assigned for a *delivery point*, the *metered market participant* must appoint, in turn, a *metering service provider* for the same *delivery point*. This relationship enables the appointed *metering service provider* to provide registration information to the *IESO* and to access *metering data* pertaining to that *delivery point*. (Chapter 6, Section 3.1.2.1 of the *market rules*, if the *metered market participant* is a *metering service provider*; Chapter 6, Section 3.1.3 of the *market rules*, if the *metered market participant* is not a *metering service provider*).

1.4.6 Meter Data Associate Relationship with a Delivery Point

Once a *metered market participant* has been assigned for a *delivery point*, the *metered market participant* may appoint, in turn, a *Meter Data Associate* for the same *delivery point*. This relationship enables the appointed *Meter Data Associate Participant* to access *metering data* pertaining to that *delivery point*.

1.5 IT Applications that Support the Process

The process of creating and maintaining *delivery point* relationships is supported by several applications.

1.5.1 MDMS and MDM Meter Data Reports

MDMS receives *metering data* validated by MDAS and generates totalization tables. The *delivery points* created and/or activated in this procedure are required for the totalization tables. The association between a *delivery point* and the relevant *meter points* is made in MDMS, based on the totalization tables submitted by the *metering service provider*.

MDM Meter Data Reports is the tool *market participants* can use to view and download market transactions.

1.5.2 CDMS

The Customer Data Management System (CDMS) is designed to meet the business requirements for the following business groups: System Capability, Market Entry and Metering Installation. The CDMS system is used by the three groups for the creation and maintenance of facility technical data:

- Registration of *market participants* and other organization types
- Registration of facilities and resources
- Registration of *metering installations*

The CDMS system maintains relationships between *Metered Market Participants* (MMP), *Metering Service Providers* (MSP), *transmitters* and/or *distributors*, and a *delivery point* (Resource).

Also, the CDMS system maintains profiles, permissions, privileges and accounts for MSP's, and MMP's. Once created and validated in CDMS, *metering*-relevant information, such as the *delivery point* relationships, is replicated to other *IESO* systems, such as MDMS.

1.6 Roles and Responsibilities

Market participants are responsible for:

- assigning/changing the *metered market participant* for the relevant *delivery point* and submitting this information, to the *IESO*;
- requesting the appointed *metered market participant* to assign/re-assign other relationships, as listed below, for a *delivery point* and submit them to the *IESO*; and
- requesting a newly-appointed *metered market participant* to identify all *meter point* IDs affected by its appointment and to communicate them to the *IESO*.

The ***metered market participant*** is responsible for:

- assigning a *metering service provider* and a *distributor* for a newly-created *energy market delivery point* as well as setting the target start date and submitting them to the *IESO*;
- assigning, where applicable, a *meter data associate participant* for a newly-created *energy market delivery point* as well as setting the target start date and submitting them to the *IESO*;
- changing the *metering service provider* for a specific *delivery point*, identifying all *meter points* affected by the change, and communicating to the *IESO* changes as they relate to the *delivery point* and to the *meter points*, respectively;
- changing, where applicable, a *meter data associate participant* for a specific *delivery point*, identifying all *meter points* affected by the change, and communicating to the *IESO* changes as they relate to the *delivery point* and to the *meter points*, respectively; and
- when appointed to an existing *delivery point*, identifying all *meter points* affected by its appointment and communicating them to the *IESO*.

The ***transmitter*** is responsible for (Chapter 10, Sections 2, 3, 5 and 6; and Appendix 6.5, Section 1.3A of the *market rules*)

- verifying a list of all *transmission customers*, including the specific type: Network, Line Connection and/or Transformation Connection, as well as setting the target start date;
- informing all *transmission customers* of their obligation to register with the *IESO* as a *market participant* for *transmission tariffs*;
- resolving with the customer any discrepancies regarding the *transmission tariff delivery points* and communicating to the *IESO* relevant info thereof; and
- communicating to the *IESO* any changes in the list or in the configuration of *transmission customers*.

The ***transmission customer*** is responsible for:

- if not a *market participant* with the *IESO*, securing authorization with the *IESO* as a *market participant* for *transmission tariffs*;
- verifying their assignment as MMPTs (Metered Market Participant Transmission) for the relevant *delivery point* and resolving any discrepancies with the *transmitter*;
- assigning a *metering service provider* for the *transmission tariff delivery point*; and
- instructing the appointed *metering service provider* to register with the *IESO* any *meters* that are required for building *transmission tariff* totalization tables pertaining to the *delivery point* (Chapter 6, Section 6.1.2A of the *market rules*).
- instructing the appointed *metering service provider* to register with the *IESO* any *embedded generation facility* under the Alternative Metering Installation Standards for Embedded Generation Facilities as defined by the ***transmitter*** using IMO_FORM_1563.

The ***IESO*** is responsible for:

- receiving information from the *metered market participant*, *metering service provider* or *transmitter*, as mentioned earlier in this section, and entering relevant data and filing information within Business Information & Records Management System (BIRM).
- communicating with *metered market participants*, *metering service providers* or *transmitters* to resolve inconsistencies in the information submitted;
- creating *transmission tariff delivery points*; and

- enabling the relationships and the start date for a *delivery point* (Chapter 10, Section 2.1 of the *market rules*).

1.7 Contact Information

If the *market participant* wishes to contact the *IESO*, the *market participant* can contact the *IESO* Customer Relations via email at customer.relations@ieso.ca or via telephone, mail or courier to the numbers and addresses given on the *IESO*'s Web site (www.ieso.ca) - or click on 'Have a question?' to go to the 'Contacting the IESO' page). If *IESO* Customer Relations is closed, telephone messages or emails may be left in relevant voice or electronic *IESO* mail boxes, which will be answered as soon as possible by Customer Relations staff.

Standard forms that participants must complete for this procedure are listed in Appendix A. These forms are generally available for downloading on the *IESO*'s Web site. These signed forms as well as the accompanying supporting documentation must be transmitted to the *IESO* via mail or courier by using the appropriate address provided on the *IESO*'s Web site or on the form. All correspondence relating to this procedure shall identify the subject: **Delivery Point Creation or Maintenance**.

– End of Section –

2. Procedural Work Flow

The diagrams in this section represent the flow of work and information related to the *metering service provider* Registration procedure between the *IESO*, the primary external participant involved in the procedure, and any other parties.

For tasks/steps that imply the use of IT applications details can be found in the associated user guides, as listed in the Reference section, at the end of the document

The steps illustrated in the diagrams are described in detail in Section 3.

Table 2-1: Legend for Procedural Work Flow Diagrams

Legend	Description
Oval	An event that triggers task or that completes task. Trigger events and completion events are numbered sequentially within procedure (01 to 99).
Task Box	Shows reference number, party responsible for performing task (if “other party”), and task name or brief summary of task. Reference number (e.g. 1A.02) indicates procedure number within current <i>market manual</i> (1), sub-procedure identifier, if applicable, (A), and task number (02).
Solid horizontal line	Shows information flow between the <i>IESO</i> and external parties.
Solid vertical line	Shows linkage between tasks.
Broken line	Links trigger events and completion events to preceding or succeeding task.

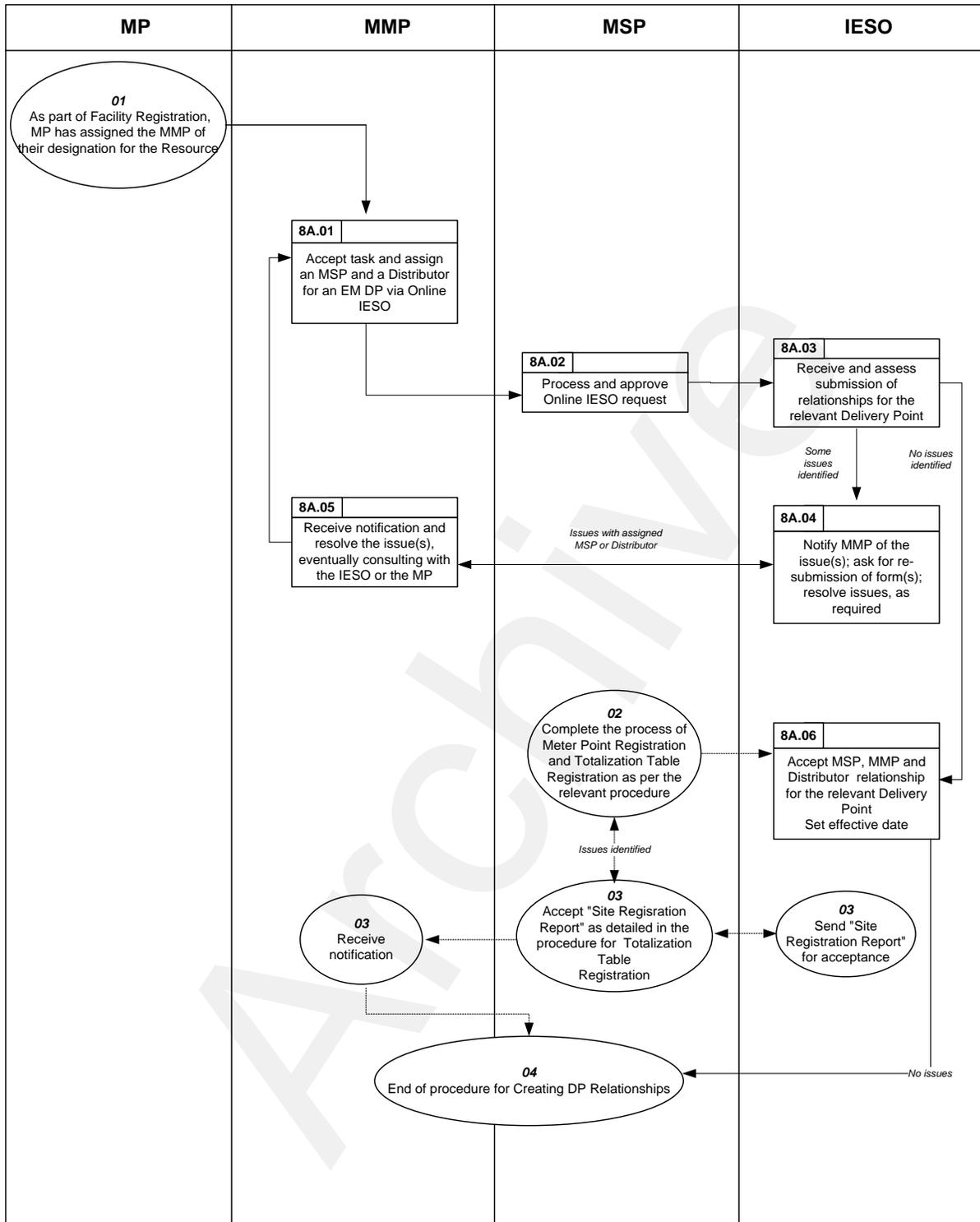


Figure 2-1: Work Flow for Creating EM DP Relationships

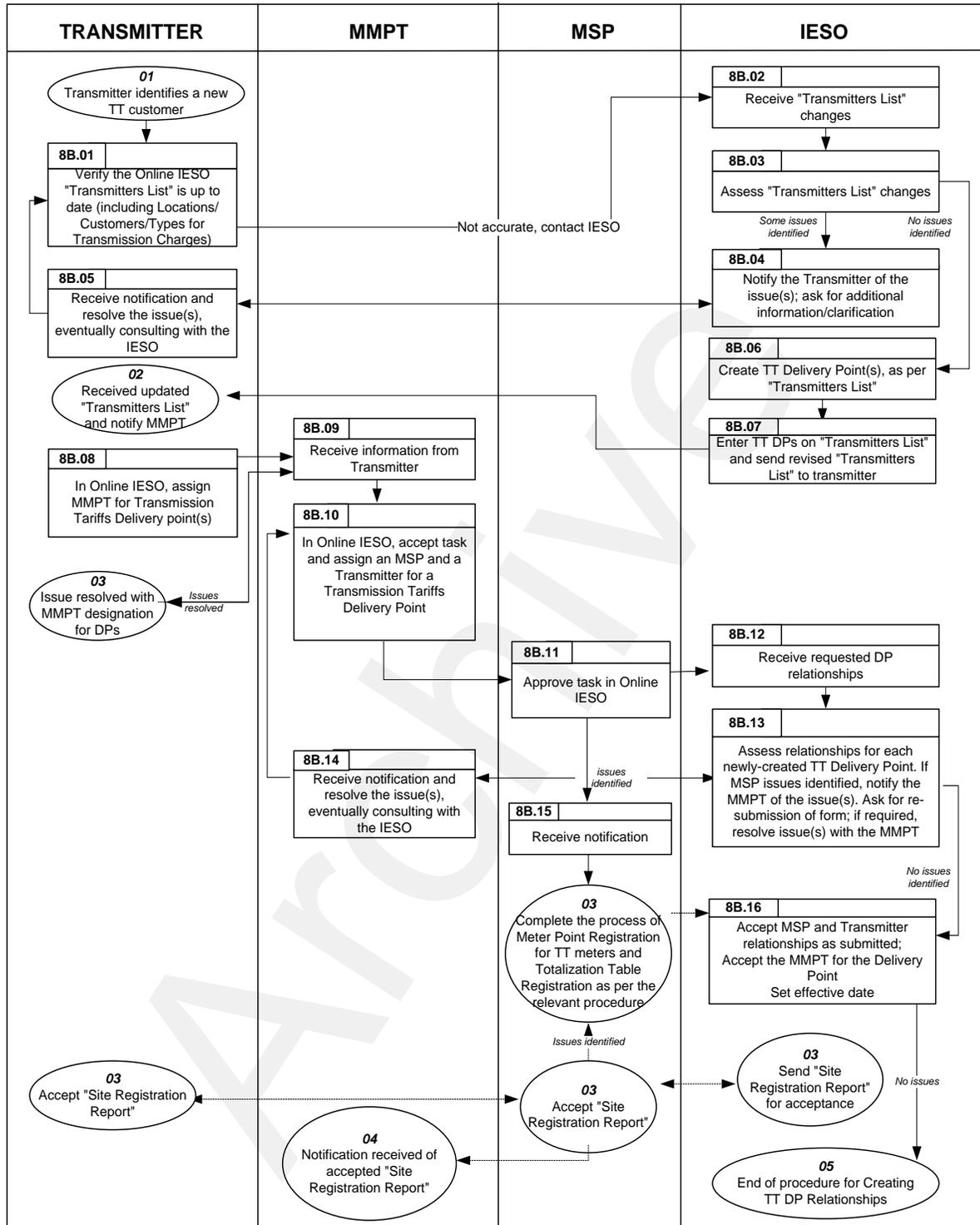


Figure 2-2: Work Flow for Creating Transmission Tariffs Delivery Points and Relationships

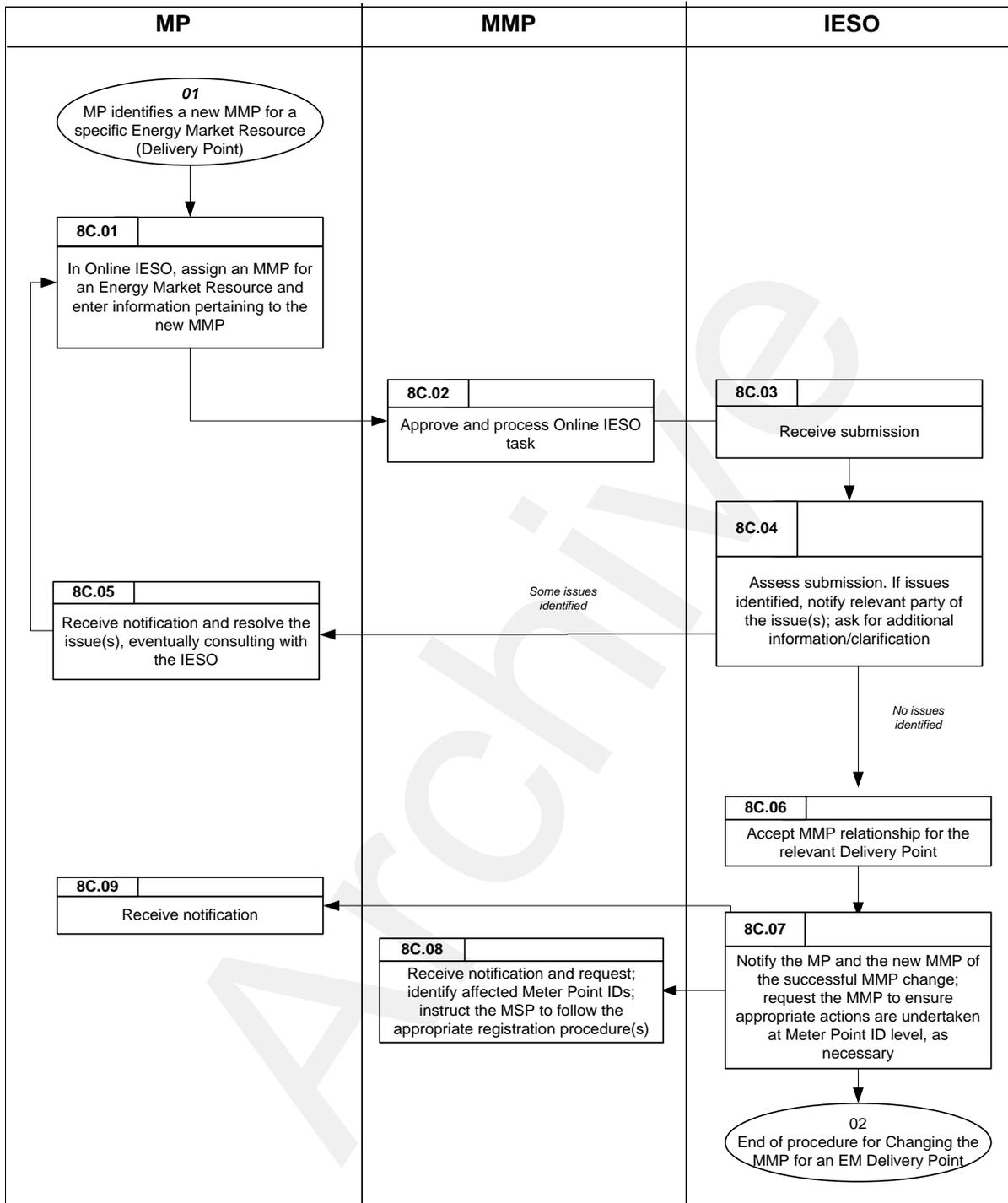


Figure 2-3: Work Flow for Change of MMP for an EM Delivery Point

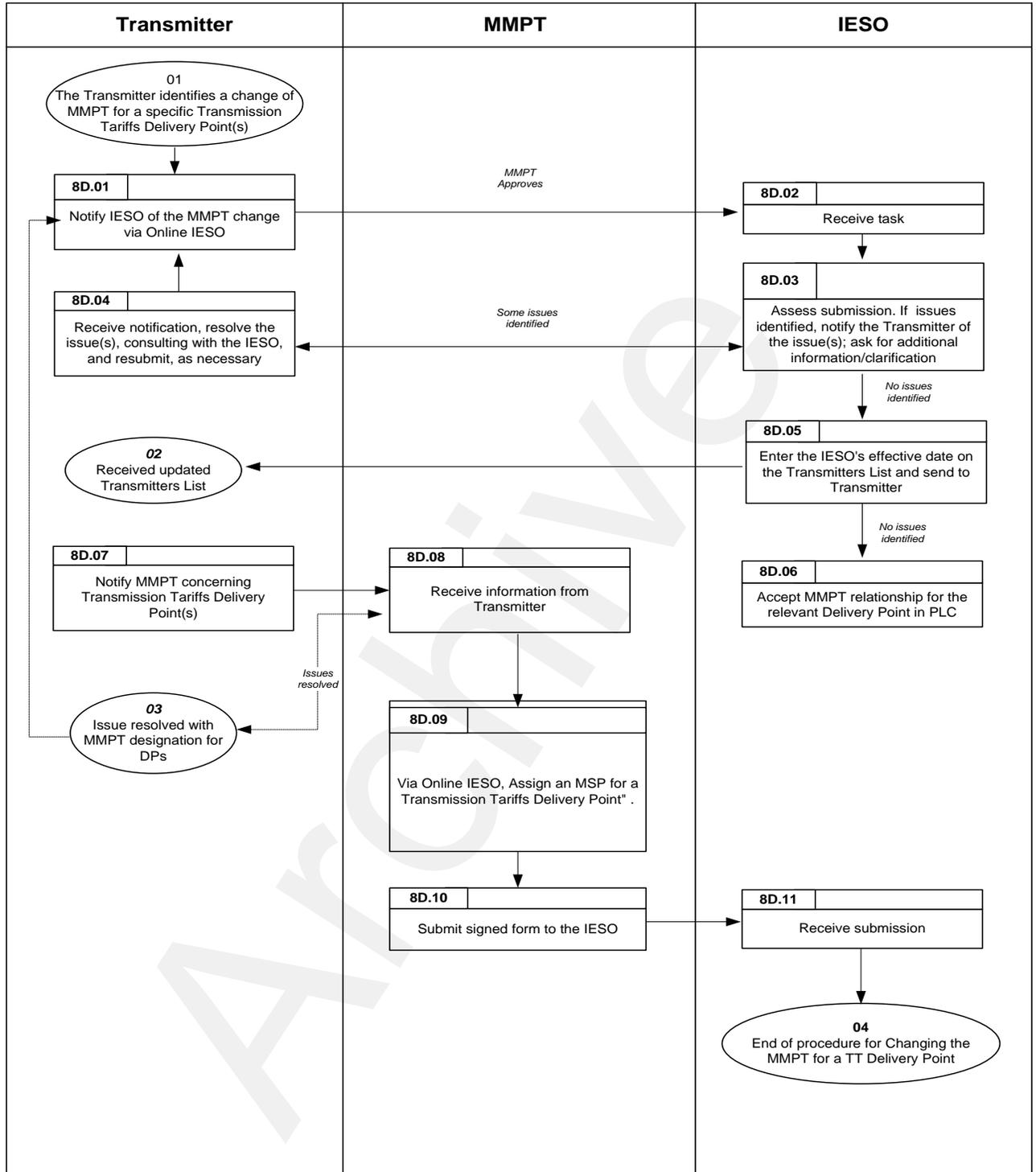


Figure 2-4: Work Flow for Change of MMPT for a TT Delivery Point

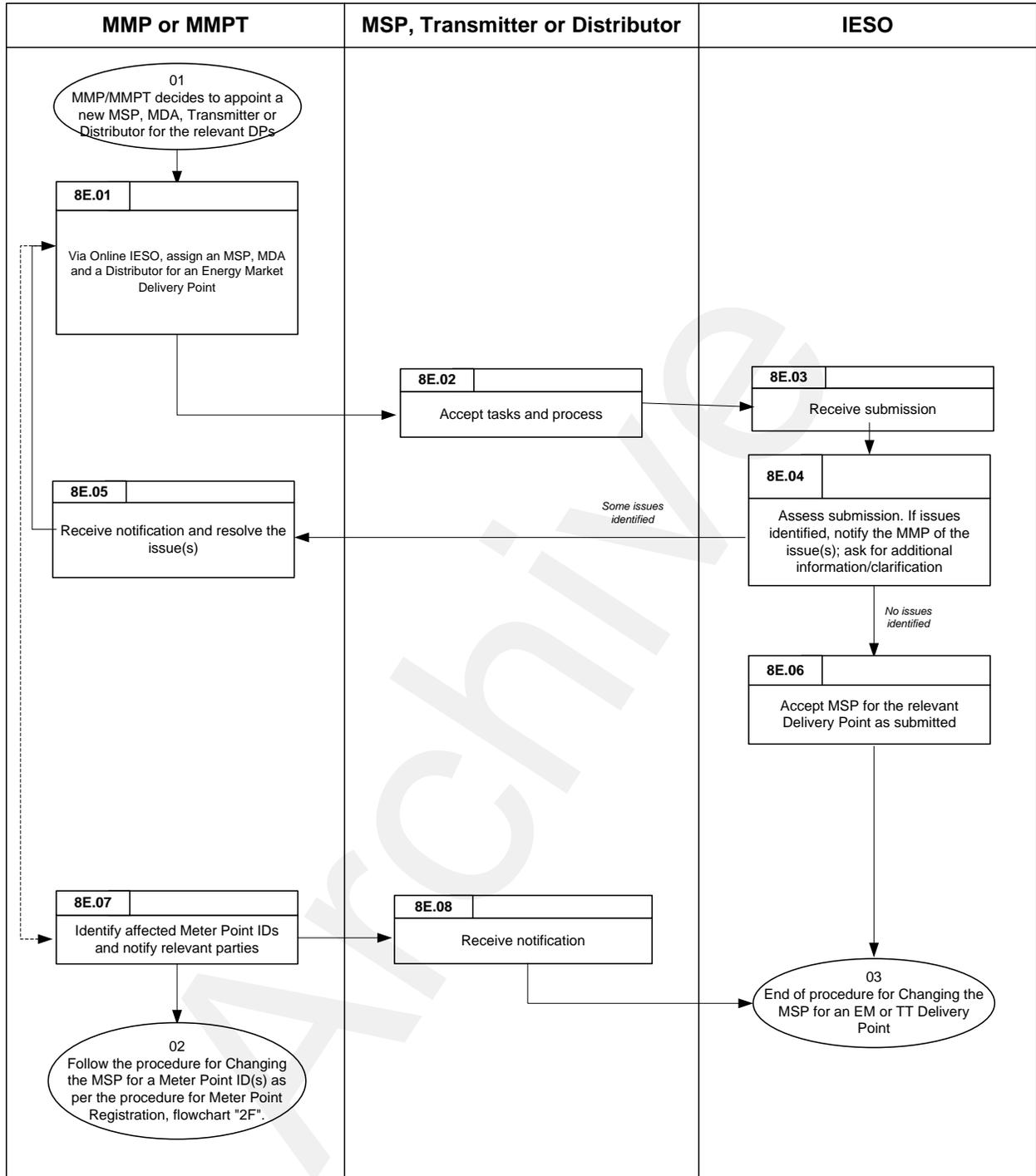


Figure 2-5: Work Flow for Change of MSP for a Delivery Point

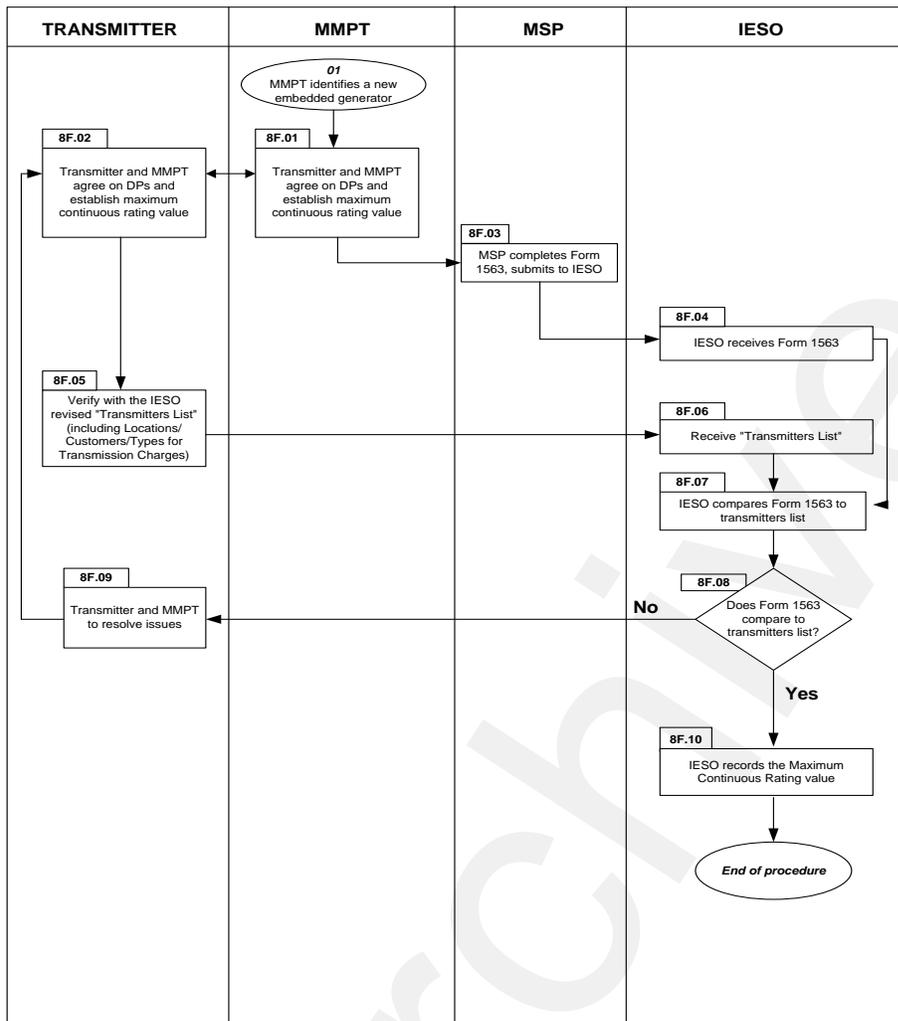


Figure 2-6: Work Flow for an *Embedded Generation Facility* registered under the Alternative Metering Installation Standards for Embedded Generation Facilities

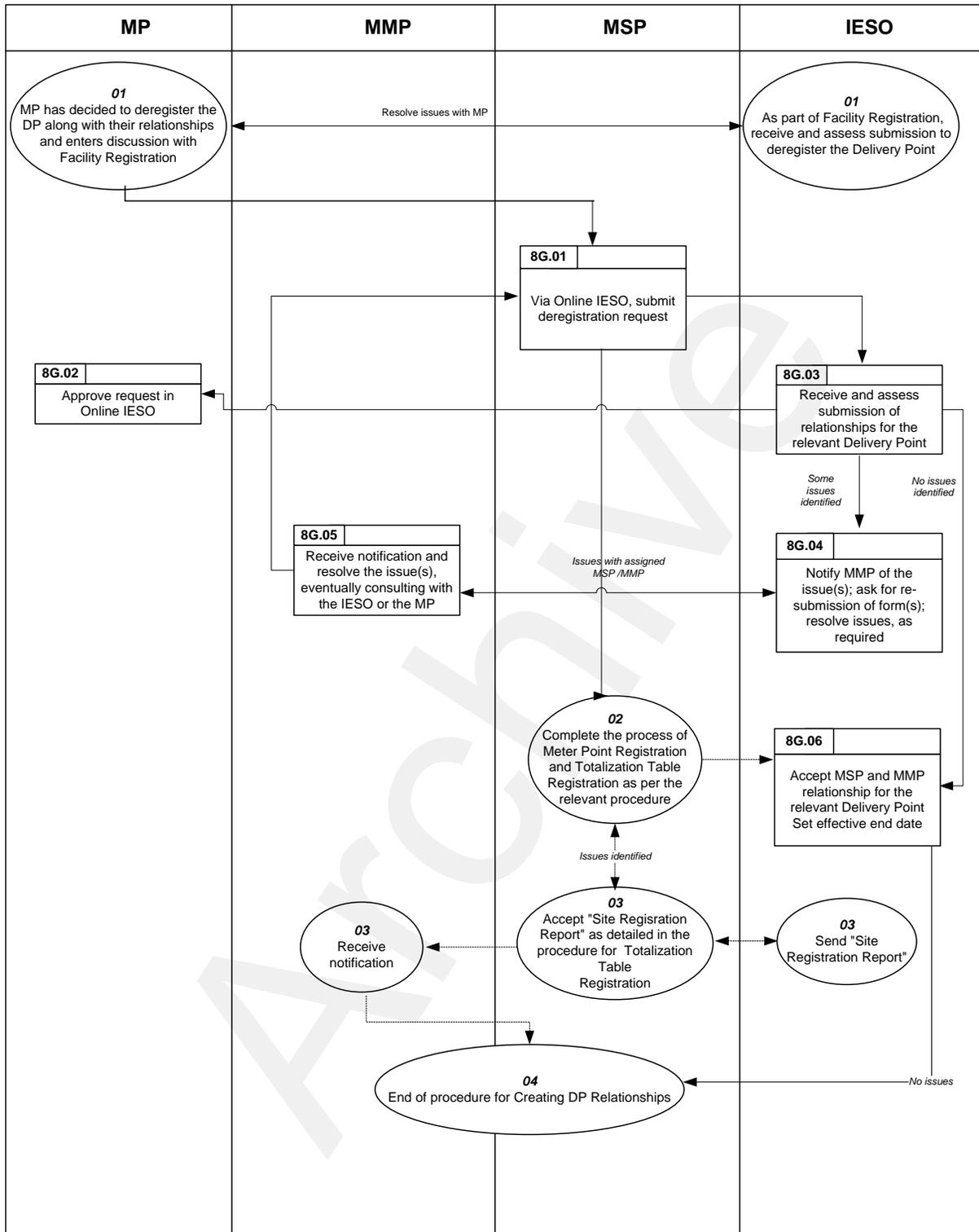


Figure 2-7: Work Flow for De-registering an EM DP and their Relationships

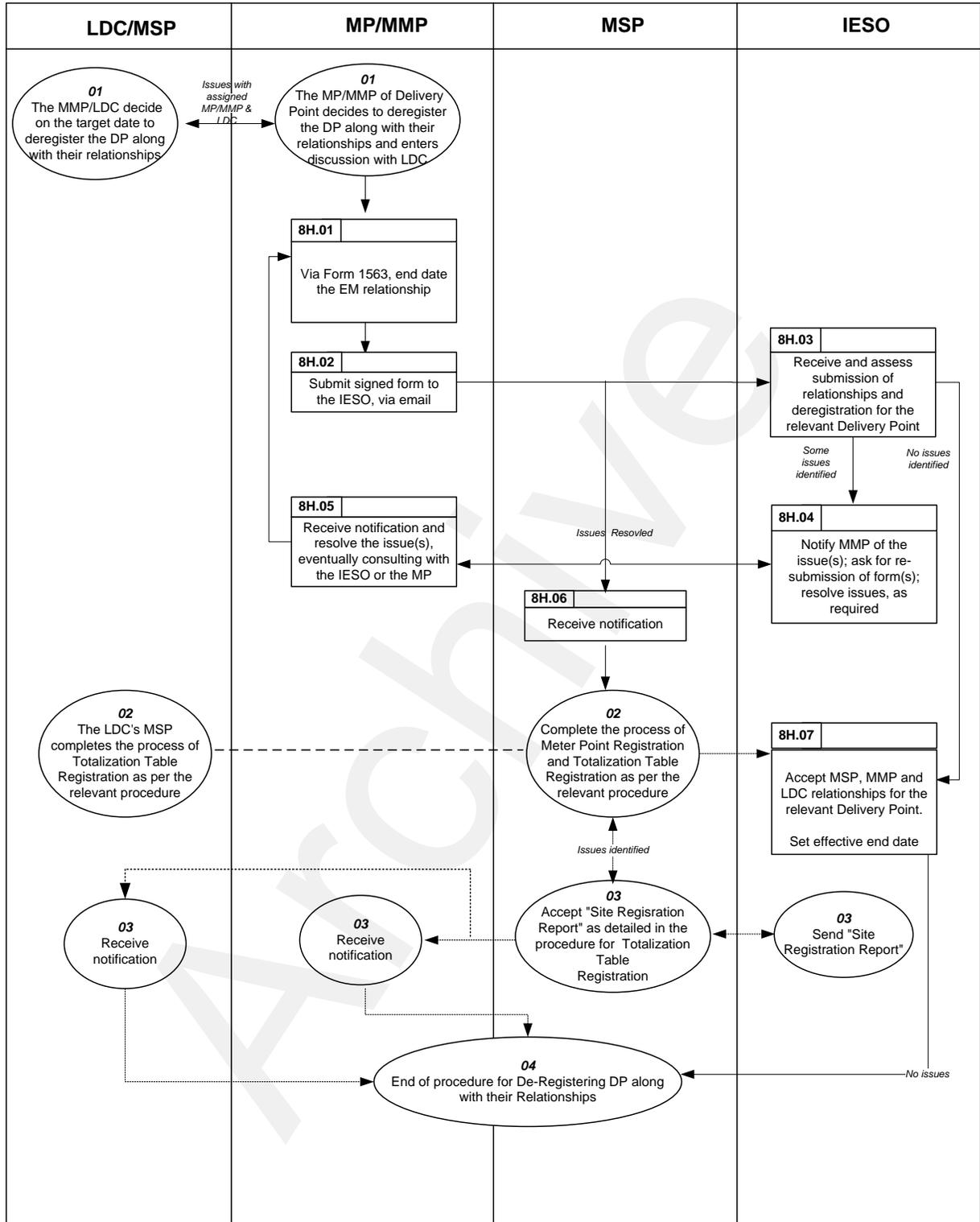


Figure 2-8: Work Flow for De-Registering an Embedded EM DP and their Relationships

- End of Section -

Appendix A: Forms

This Appendix contains a list of forms used in this procedure, which are available on the *IESO's* Web site (<http://www.ieso.ca>). The forms included are listed in the table below.

Form Name	FORM No.
Registration of an Embedded Generation Facility	IMO_FORM_1563

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Appendix B: Sample of Transmitters List

This Appendix contains a sample of a ‘Transmitters List’ verified with the *IESO* by a *transmitter*. The list informs the *IESO* of *transmission customers* associated with a *delivery point*.

TRANSMITTER: (e.g. XYZ)

Facility Name (Station)	Transmission Customer Name	Transmission Network DP	Transmission Connection DP	Pays Transformation Connection Pool?	Pays Line Connection Pool?	Embedded Generator				IESO Effective Date	Transmitter Effective Date
						Generator Name	Maximum Continuous Rating (MW)	Wholesale Registered Meter/Form 1563	Start Date of Generator		
Station TS	Town Utilities Corporation	100001	100002	Yes	Yes	Town District Energy		WRM	2002/05/01	2007/01/01	2006/11/01
						General Hospital Co-Generation	4.5	Form 1563	2007/01/01		

– End of Section –

References

Document ID	Document Title
MDP_RUL_0002	Market Rules for the Ontario Electricity Market
MDP_PRO_0016	Market Manual 1: Market Entry, Maintenance, and Exit, Part 1.2: Market entry, Maintenance and De-Registration
MDP_MAN_0003	Market Manual 3: Metering, Part 3.0: Metering Overview
MDP_PRO_0007	Market Manual 3: Metering, Part 3.1: Metering Service Provider (MSP) Registration, Revocation, and De-registration
MDP_PRO_0013	Market Manual 3: Metering, Part 3.2: Meter Point Registration and Maintenance
IMP_PRO_0047	Market Manual 3: Metering, Part 3.7: Totalization Table Registration

– End of Document –