


<p align="center">STANDARD OPERATING PROCEDURE</p>	<p>No.: SOP-123</p>
	<p>Prepared and Concurred By: Meter Task Force Committee</p>
<p>Title: Accountability and Movement of Meters</p>	<p>Approved By:  JOHN M. BENAVENTE, P. E. General Manager</p>
<p>Effective Date: <u>8/29/17</u> Supersedes No. N/A Page 1 of 10</p>	

1.0 PURPOSE

This Standard Operating Procedure (SOP) is intended to provide guidelines for the movement and accountability of meters.

2.0 SCOPE

This procedure applies to all divisions involved in the movement and proper accounting of meters.

3.0 RESPONSIBILITY

The Meter Task Force Committee is primarily responsible to ensure that the process and guideline set forth are adhered to. The Meter Task Force Committee is comprised of representatives from the following divisions:

- Transmission & Distribution (T&D) Meter Shop
- Procurement Management & Materials (PMM)
- Customer Service
- Internal Audit Office (IAO)
- Finance & Accounting (Budget and Plant Accounting Sections)
- Strategic Planning & Operations Research Division (SPORD)
- Information Technology

Other sections tasked to perform according to this procedure must coordinate with T&D Meter Shop section to ensure proper accountability of meters.

4.0 **GENERAL**

This SOP provides guidelines for work processes pertaining to the movement of meters within the Authority. This SOP was completed based on the review and input from divisions and officials who do the job. It was established to ensure that objectives are achieved in an efficient and effective manner. It also allows for consistent treatment across the organization and staff assigned not knowledgeable of the process will have guidance.

The SOP outlines the requirements involving meter movement work processes including requisitioning, receipts of goods, recording of assets, meter information uploading, issuance of meters, removal of meters, return of meters, disposable/retirement of meters, reconciliation of meters, and annual inventory.

5.0 **ORDERING OF METERS**

- 5.1 The Standardization Committee will determine the reorder point through review and analysis of a safe inventory level. Lead times and inventory levels will be factored when ordering meters.
- 5.2 The Inventory Management Officer (IMO) receives the meter order information from the Standardization Committee and will requisition for the procurement of meters. The meters will be charged to an inventory account (account no. 32200.154).
- 5.3 The IMO will provide the corresponding meter serial number sequence by series in the requisition. A SPORD official will review and approve the meter serial number sequence, which also serves as the secondary review.
- 5.4 Purchasing specification will require the vendor to furnish via email to lg-mmfmf@gpagwa.com the Meter Manufacture File (MMF) and Meter Factory Test Results File for all new meters purchased.

The MMF file contains the manufacturer, customer, shippedTo, shippedToState, shippedDate, custMeterNo, mfgSerialNumber, amrSerialNumber, integratedSerialNumber, cononicalAmrSerialNumber, kH, numDials, form, base, and class information.

The Meter Factory Test Results File contains L+G#, Customer#, Module#, TestDate, Catalog#, FL, PF, LL, Meter Form, Meter Class, Pallet, Carton Number, and Shipment Number information. The Authority will rely on the validity of factory test results from these files.

6.0 RECEIPT & INFORMATION UPLOAD OF METERS

6.1 **Receipt of Meters.** The Dededo Supply Warehouse will receive meter orders from the vendor with quantities verified against the delivery ticket and purchase order.

- a) Dededo Supply Warehouse official signs the receiving report and enters the receipts in the JDE PO/AP system.
- b) Warehouse official will verify that the deliveries and receipts of meters are consistent with the invoice and purchase order.
- c) Dededo Supply Warehouse will store and safeguard the meters.

6.2 **Upload of Meters MMF Information.**

- a) **JDE Fixed Asset:** Upon receipt of the MMF file, Finance Plant Accounting official to import/upload meter information by lot into the JDE Fixed Asset module.
- b) **Command Center:** Meter Shop official to import/upload MMF file into the Command Center.
- c) **Customer Information System (CIS):** Upon notification from Meter Shop official, an Information Technology official will import/upload the MMF file into the CIS.

7.0 METER ISSUANCE

Issuance of meters will be done through the Supply Issue Receipt work order by lot to Meter Shop personnel **only**. The issuance will be tracked in the meter master record. A custody receipt will be system generated to record all meter issuance to include information on work order, customer name, meter serial number, new/used, issued by, received by, phase, and remarks.

Meter Shop may issue Customer Service no more than 10 single phase meters (combination of 2S and 12S meters) for their safety stock. These meters are needed by Customer Service when addressing customer reported emergencies, such as reconnections, defective meter switch, or meter not communicating after reconnection.

8.0 **METER INSTALLATION**

- 8.1 **Receipts of Work Order through CIS System.** Installations of meters are done for the following: new service; temporary service; temporary to permanent service; relocation; or reconnection.

Customer Service Division initiates the work order request for meters through customer application. Depending on the customer work order requirement, Engineering Division may conduct site investigation prior to release of the work order to T&D Division. These requirements include new installation permanent and temporary power, meter relocation, and voltage upgrades/downgrades.

- 8.2 **Installation of Meters.** Three (3) phase CT type rated meters are installed by Meter Shop personnel. All other types are installed by personnel from Customer Service Reconnection/Disconnection section or T&D field crew personnel.

Installations are performed upon completion of required documents and processes (inspections/site investigations/payments). Refer to Sections 9.2-9.4 for *GPA Electrical Inspection Report* requirement.

- 8.3 **Completion of Installation.** Meter installations are completed by Customer Service Division and Meter Shop personnel. The document is locked (closed) and the meter number is attached to the service agreement in the CIS system.

Excluding any complications and issues, work order document will be locked in the CIS within three working days of work completion. Work orders with issues will be separated and addressed accordingly.

The work order and meter installation is forwarded to Customer Service Division for review to ensure that the meter status is updated to active and ready for billing.

Copies of the completed meter installation reports are submitted daily to Meter Shop section for tracking and control.

A copy of the work order is sent to Finance Division.

The documents are then transmitted to the Records Section of the Customer Service Division for archives.

9. REMOVAL OF METERS

9.1 **Handling of Meters Due to Termination of Accounts.** Customer account terminations are done via the CIS work order at the request of the customer. For 2S and 12S forms, meters will be switched to the open position via Command Center. Meters are kept on the premise, unless otherwise directed. Final readings are recorded from the effective date of termination request and then the final bill processed.

9.2 **Removal of Meters Due to Scheduled Work Clearances per Customer Request.** Meter removals are prompted by a CIS work order at the request of the customer. Scheduled work clearances are initiated upon customer's request via the CIS work order processed by the Customer Service Division.

Based on the work order's scope of work, the Customer Service Division determines if the work clearance request will be forwarded to the Engineering or T&D Division and whether a *GPA Electrical Inspection Report* is required.

Meters are removed from the premise to execute work order requirements. The same meter will be returned to the premise upon the customer's submittal of a completed inspection report, if warranted. An inspection clearance from a Department of Public Works inspector is required when an inspection report is issued to the customer. The form validates that the work inspected was completed and complied with applicable rules, regulations, codes and standards of the departments governing metering and electrical wiring.

9.3 **Removal of Meters due to Work Clearances Emergency Situations.** This type of removal is primarily initiated by the Authority because of safety concerns, situations after a natural disaster, or indications that the meter is unlisted or tampered. Work is immediately dispatched to T&D Troubleshooting crew for completion of task.

The PSCC Trouble Dispatcher will record all information from the crew on a trouble report form and transmit the report to T&D and Customer Service Administrative sections. The T&D Troubleshooting crew will complete and forward all other documents to Meter Shop section for processing.

A work order is generated to record and document the meter removal in the CIS system. Customer must submit a completed *GPA Electrical Inspection Report* prior to reconnection of service, if warranted.

- 9.4 **Change Out of Meter.** Meter change out is initiated via the CIS work order through customer's request; Customer Service Division; or T&D Meter Shop sections. The work order is forwarded to Meter Shop or Customer Service Reconnection/Disconnection sections for field investigation and meter change out. Customer must submit a completed *GPA Electrical Inspection Report* prior to reconnection of service, if warranted.

The change out meter information is recorded in the CIS work order by Meter Shop personnel and is logged on the *Meter Installation Investigation Report* form. Meter Shop will provide the form with the corresponding work order to Customer Service for billing and record purposes.

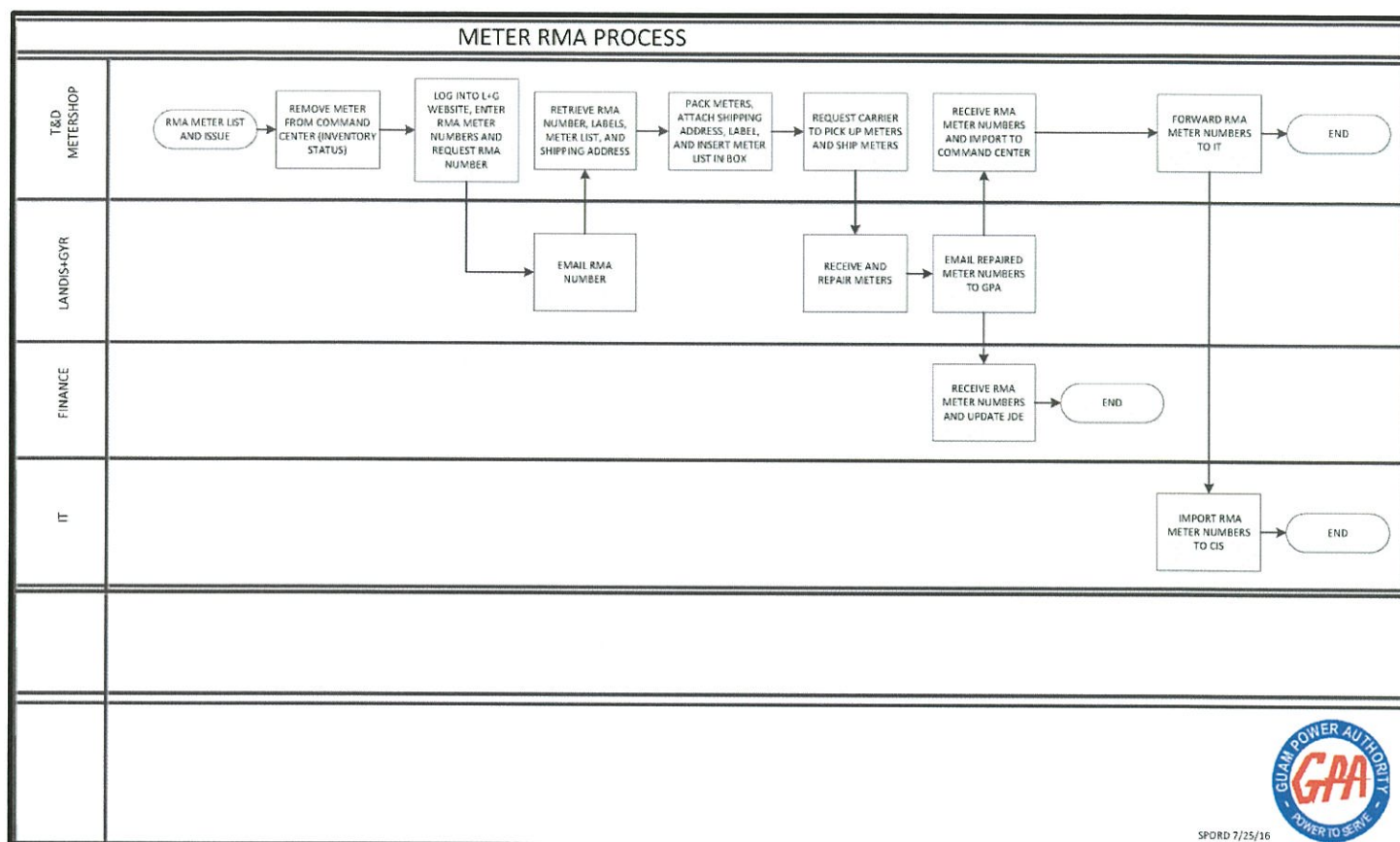
10. RETURN OF REMOVED DEFECTIVE METERS

All removed defective meters must be returned to the Meter Shop section no later than two working days after meter removal. Defective meters will be staged by Meter Shop for RMA processing. Refer to Section 11.1 for the RMA process.

11. RETURN TO MANUFACTURER & REPORTING OF DEFECTIVE METERS

- 11.1 Discovery of defective meter after it has been put to service or Return to Manufacturer Authorization (RMA) process will be carried out by Meter Shop. Meter Shop will coordinate the return of RMA meters to vendor. Meter Shop will be responsible in ensuring that RMA returned meters are shipped and received by the vendor.

Upon receipt of new/replaced RMA meters, Meter Shop to test 100% of meters received to ensure that the meter's configuration is consistent with the Authority's specifications. The following flowchart depict the RMA process.



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- 11.2 **Reporting of Damaged Meters.** Meter Shop will prepare a damaged meter report (RMA meters) including, but not limited to, meter number and meter form information. This report will be forwarded to Plant Accounting and Information Technology sections.

Meter Shop will also provide Plant Accounting and Information Technology sections the list of the new/replaced RMA meters sent by the vendor.

- 11.3 **Stolen Meters.** IAO Revenue Protection Service will notify Plant Accounting (for JDE Fixed Asset system); Meter Shop (for CIS); and Disconnect/Reconnect Section (for Command Center) of stolen meters upon discovery and confirmation through its investigation. The meter number, service location, and reference account number information will be reported.

12. DISPOSAL & RETIREMENT OF METERS

- 12.1 **Salvage of Unusable Meters.** Unusable meters must be identified on a periodic basis and coordinated with Warehouse for ultimate disposal. Once Meter Shop fills its salvage bin with unusable meters, it will be forwarded to Warehouse officials to initiate the salvage bid process.

Salvaged meters will be accompanied by a retired meter report provided by Meter Shop. The report will include, at the minimum, the meter number and meter forms.

Warehouse official will verify the number of meters received against the number of meters identified in Meter Shop's retired meters report.

- 12.2 **Removal of Salvaged and Unusable Meters from the Systems.** The Information Technology section will provide periodic system-generated report of all retired meters. Regular distribution of this report will include officials from Meter Shop; Warehouse; Customer Service Reconnection/Disconnection; and Plant Accounting sections.

The information source of the report will derive from the meter status update performed by Meter Shop personnel in the CIS system:

- a) Meter Shop will update meter status to "retired" in the CIS system. Meters to be "retired" from the system are those that are being salvaged or deemed unusable.
- b) Customer Service Reconnection/Disconnection to input the retired status of the salvaged and unusable meters in Command Center.
- c) Plant Accounting to remove retired meters from the JDE Fixed Asset system.

13. METERS RECONCILIATION & ANNUAL PHYSICAL INVENTORY

- 13.1 **Monthly Meters Reconciliation.** Reconciliation is essential for maintaining proper control and accountability over assets. Plant


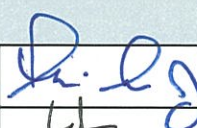
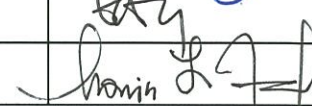



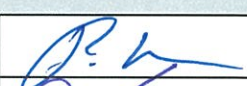




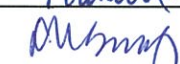
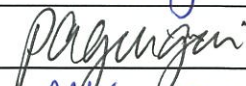
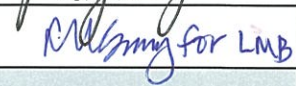

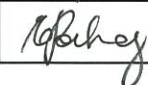
Accounting performs its monthly meters reconciliation of JDE Fixed Asset data with Command Center's meter count.

To ensure that meters are reconciled, the IAO will monitor Plant Accounting's reconciliations and work with them to ensure that discrepancies are researched and explained in a timely manner. The reconciliation will also benefit the Authority during the annual external audit performed by an independent CPA firm.

- 13.2 **Annual Physical Inventory.** Physical inventories are a general control over property and equipment, which accounts and verifies the existence of materials and equipment. The Authority, under the PMM section, is mandated to perform annual physical inventory of all materials and supplies stored at the Dededo and Generation Supply Warehouses.

The Dededo Supply Warehouse inventory includes the physical count of all stocked meters. To ensure accountability, second and third counts (auditor) are performed. Any discrepancy noted are verified and investigated both by the IMO and Plant Accounting official. Any inventory adjustment for overage and shortage are booked by Plant Accounting officials to correspond with actual inventories. Reference SP-068, *Annual Physical Inventory Procedure*.

NOTE: Below are the Meter Task Force Committee Members who actively participated in the formulation and finalization of this policy.

Meter Task Force Committee Members	
Transmission & Distribution (T&D) Meter Shop	
Anselmo Manibusan, T&D Manager (Acting)	
Enrique Quidachay, Asst. T&D Manager (Acting)	
Monica Fernandez, Meter Shop Supervisor	
Customer Service	
Mercy Castro, Utility Service Administrator	
Richard Bersamin, Asst. Customer Service Manager	
Jamie Pinaula, Customer Service Supervisor	
Procurement Management & Materials (PMM)	
Reuben Ulloa, Inventory Management Officer	
Vicente Concepcion, Warehouse Supervisor II	
Internal Audit Office (IAO)	
Maripaz Perez, Internal Auditor	
Arleen Sahagon, Management Analyst IV	
Finance & Accounting (Budget and Plant Accounting Sections)	
Cora Montellano, Asst. Chief Financial Officer	
Lenora Sanz, Controller	
Pamela Aguigui, Chief Budget Officer	
Luz Burgos, Accountant III	
Strategic Planning & Operations Research Division (SPORD)	
Roel Cahinhinan, Special Projects Engineer	
Information Technology	
Eileen Bihag, Database Administrator	

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