

## Hiring Practices and Education and Training Criteria

The criteria outlined below are proposed as minimum requirements for an MDMA/meter reader. The information should be used as a template for each Job Function or Operational Job Category (System Operators, System Administrators, Information System Analyst, etc.) Use the checklist below to ensure that the required topics are included in your documents. Check off each item that is included and submit a copy of each relevant document with this application.

### I. Hiring Practices

Provide an outline of your current hiring practices. Include the following for manual meter reading:

✓	Criteria
	Security screening
	Drug screening
	Photo Identification
	Proof of valid driver's licenses

## II. Education Description

Education is defined as the educational level required to perform the required job functions, as well as personal attributes and skills developed prior to employment in the position.

✓	Criteria
	Required competencies, i.e., data base analysis, simple math, etc.
	Experience.
	Typing, oral, written, or other communication requirements.
	Demonstrated skill operating different required software.
	Programming skills, if applicable.
	Hardware support skills, if applicable.

## III. Example: Job Description

The Data Retrieval Analyst/Operator is responsible for operating data retrieval software and systems which can retrieve interval usage data from meter/data recording equipment remotely by radio frequency, phone lines, or other technology. The Data Retrieval Analyst/Operator schedules automatic retrieval cycles, reviews error reports, investigates reasons why sites did not call in and resolves those problems, performs quality checks and estimation procedures, imports and exports data files to other systems including UDC sites. Interacts with internal staff, external vendors, UDCs, customers. Ensures data quality and maintains a safe working environment.

#### IV. Training Curriculum Description

The training program for an MDMA/meter reader should include lesson items listed below. Training may be accomplished by a combination of on-the-job(field) training, vendor provided training using classroom instruction and self-paced training including video instruction. Use the checklist below to ensure that the required topics are included in your documents. Check off each item that is included and submit a copy of each relevant document with this application.

Please include an example class outline, curriculum, and or test to show how the training is performed and the level of detail provided in the training program. It is only necessary to provide an example document. **Do not include all training curriculum.**

✓	Item	Criteria
	Safety-appropriate work habits	Minimum annual requirements: 1 hr ergonomics training with optional workstation evaluation 1 hr lifting techniques training 2 hrs per year work area safety awareness  For manual meter reading only: <input type="checkbox"/> Cal OSHA Title 8 General Safety Orders <input type="checkbox"/> Accident reporting <input type="checkbox"/> Defensive driving <input type="checkbox"/> Hazardous material communication <input type="checkbox"/> Environmental safety/ergonomics <input type="checkbox"/> Dog bite prevention
	Interpersonal interactions with internal and external customers (customer service) including responses to routine questions about MDMA services, as well as procedures for handling unusual or difficult situations	Minimum annual requirements: 6-8 hrs formal instruction in customer service including individual role play and evaluation of trainee's skills. Follow up on the job quality checks by supervisor
	Graded series modules on meter concepts and terminology including meter and recorder configuration (unit of measure codes-KW, KVAR; multipliers)	Training outlines and modules
	Overview of MDMA requirements	Training outlines and modules

✓	Item	Criteria
	For Interval data training in: CPUC requirements <ul style="list-style-type: none"> <li>❑ Validation, editing, and estimating</li> <li>❑ Hardware check</li> <li>❑ Zero consumption for active meters</li> <li>❑ Usage for inactive meters</li> <li>❑ KVARH check for consumption data, if applicable</li> <li>❑ Applying adjustments</li> <li>❑ Re-framing data and the time-of-use check</li> <li>❑ Data transformation using the California Metering Exchange protocol format</li> <li>❑ Data and data base integrity checks               <ul style="list-style-type: none"> <li>❑ Daily</li> <li>❑ Weekly</li> <li>❑ Periodic</li> </ul> </li> <li>❑ Energy diversion</li> </ul>	Training outlines and modules
	Training on vendor specific retrieval equipment: <ul style="list-style-type: none"> <li>❑ Software</li> <li>❑ Data base structure</li> <li>❑ Account record set up Data retrieval functions</li> <li>❑ Troubleshooting</li> <li>❑ File import and export</li> <li>❑ Technical Support</li> </ul>	Training outlines and modules
	For manual meter reading only: <ul style="list-style-type: none"> <li>❑ Combination classroom &amp; field training – minimum of 10 days</li> <li>❑ Meter Pro (or other “How to Read” training programs) training and testing</li> <li>❑ Hand-held device training</li> <li>❑ Standards of conduct</li> <li>❑ Identification of hazardous conditions, (I.e., wires down)</li> <li>❑ Company uniform/identification card</li> <li>❑ Customer key security</li> <li>❑ Insurance requirements (personal insurance, if non-company vehicle)</li> </ul>	Training outlines and modules
	Equal Employment Opportunity Information	Training outlines
	Disaster Recovery Plan	Training outlines and modules

## V. Training Manual Description

The training manual for an MDMA should include the items listed below. Use the checklist below to ensure that the required topics are included in your manuals. Check off each item that is included and submit a copy of a manual with this application. Please provide an example of training manual that shows the type of information and detail contained in your other training manuals. It is only necessary to provide an example manual. **Do not include all training manuals.**

✓	Criteria
	Written procedures for each major group of tasks written at the level for a new hire to use after on-the-job demonstration (Additional Quick Reference Guides optional)
	Daily operating procedures including: <ul style="list-style-type: none"> <li><input type="checkbox"/> System function checks</li> <li><input type="checkbox"/> Reviewing daily polling cycles</li> <li><input type="checkbox"/> Identifying missed and problem calls</li> <li><input type="checkbox"/> Validating, editing and estimating data</li> <li><input type="checkbox"/> Troubleshooting</li> <li><input type="checkbox"/> File imports and exports</li> <li><input type="checkbox"/> Responding to vendor and customer questions</li> </ul>
	Weekly processes to ensure data quality, timelines and validate polling schedules
	Periodic and annual processes to ensure data quality and timeliness
	Energy diversion program
	Safety procedures
	Data Recovery procedures
	Procedures for manual meter reading only: <ul style="list-style-type: none"> <li><input type="checkbox"/> Hand-held training manual</li> <li><input type="checkbox"/> Meter reading training manual</li> <li><input type="checkbox"/> Accident prevention manual</li> </ul>