



Meter Socket Adapter Program

Device Evaluation Process Guide

Program Overview and Goals

The Meter Socket Adapter (MSA) Program is designed to streamline the installation or removal of customer-owned isolating or non-isolating MSAs without requiring modifications or upgrades to the residential electrical panel for eligible customers.

Traditionally, installing distributed energy resources (DERs), like photovoltaic solar and batteries, or electric vehicle (EV) charging equipment often involves rewiring or upgrading the main electrical panel, which can be expensive. The MSA Program provides an alternative installation method that helps customers avoid these costly upgrades when adding new electrical generation and loads like DERs or EV chargers.

MSAs are mounted as extensions to the customer's meter cabinet, offering a safer and more convenient installation by eliminating the need to access or alter the service panel. This approach saves both time and money compared to conventional methods. To participate, customers must select an SDG&E-approved product from the SDG&E® **Approved MSA Product List**.

Adding a New Device to the Approved Product List

To add a new Meter Socket Adapter (MSA), whether isolating or non-isolating, to SDG&E's Approved MSA Product List, vendors must first complete a review and evaluation by SDG&E. SDG&E may also elect to complete a pilot testing process as needed for new devices. The detailed steps of this process are outlined in the section below. Additionally, a **Frequently Asked Questions (FAQ)** section is provided at the end of the document for further guidance.

Detailed Process Flow for Device Approval

Process Diagram:



Request & Intake

1. Vendor sends an email to ServiceStandards@sdge.com for a MSA Intake Form
2. Vendor completes and submits MSA Intake Form, associated documentation, production-ready devices and all associated accessories for review and evaluation

Review & Evaluation

3. SDG&E reviews vendor request within thirty (30) business days
4. SDG&E performs metering evaluation testing
5. SDG&E performs functional evaluation testing, coordinating with vendor and other utilities as appropriate, shares evaluation results within ninety (90) days

Approval & Deployment

6. SDG&E drafts Memorandum of Understanding (MOU) within thirty (30) business days for vendor to review and sign
7. SDG&E adds MSA to SDG&E Approved MSA Product List
8. MSA becomes available for field deployment

Request & Intake

1. Send email to ServiceStandards@sdge.com	
Description	Vendor to email ServiceStandards@sdge.com to start evaluation process.
Vendor Activities	Email ServiceStandards@sdge.com to request MSA Intake Form.
Documents Required	None.
SDG&E Activities	Provide vendor with MSA Intake Form.

Vendors should send an email to **ServiceStandards@sdge.com** requesting an MSA Intake Form. SDG&E generally responds to requests within 5 business days of receipt. Once the MSA Intake Form has been filled out and submitted to SDG&E, the evaluation process may begin.

2. Complete MSA Intake Form	
Description	Vendor completes the MSA Intake Form.
Vendor Activities	Complete and send MSA Intake Form with documentation and send physical items listed in the Product and Equipment Checklist to the Service Standards team at the specified address.
Documents Required	<ul style="list-style-type: none"> • Technical Reference Guides for hardware • Technical Reference Guides for functionality • List of all standards the device adheres to • External Certification reports • All final internal testing reports • MSA field configuration guidelines and specification sheet • At least two production-ready MSAs, all associated software, accessories, and tools for operating the units
SDG&E Activities	None

Vendors should complete the MSA Intake Form and submit it along with all supporting documents to **ServiceStandards@sdge.com** alongside at least two production-ready sample devices, all associated software, accessories, and tools for operating the evaluation units to SDG&E Service Standards team at the address below:

SDG&E Electric Distribution
Engineering - Service Standards
 Mailstop: CP52F
 8316 Century Park Ct
 San Diego, CA 92123

Review & Evaluation

3. SDG&E® Reviews Vendor Request & MSA Intake Form	
Description	SDG&E Service Standards team reviews vendor request.
Vendor Activities	Provide support for any Service Standards team-related inquiries.
Documents Required	No additional documents.
SDG&E Activities	SDG&E Service Standards reviews request to ensure that all technical documents have been received from the vendor.

SDG&E Service Standards team conducts a preliminary technical review of the device documentation and ensures that the vendor provides evaluation samples along with the necessary tools to support evaluation testing. The initial review process takes up to thirty (30) business days. If necessary, SDG&E may request additional documentation from the vendor prior to further evaluation testing. Upon completion, SDG&E will inform the vendor whether their submission has been accepted for Metering and Functional Evaluation Testing.

4. SDG&E Performs Metering Evaluation Testing	
Description	SDG&E's Electric Metering Engineering (EME) team performs Metering Evaluation Testing.
Vendor Activities	Provide support for any EME team-related inquiries.
Documents Required	No additional documents.
SDG&E Activities	EME team performs testing of MSA device.

SDG&E EME team performs Metering Evaluation Testing of the MSA device with an SDG&E smart meter connected to validate MSA device has no significant impact to smart meter accuracy or normal operation. Test cases include basic accuracy testing, voltage monitoring, and ensuring normal smart meter operation without compromise. If the device fails the test, SDG&E will communicate with the vendor, and a resolution is sought. Once Metering Evaluation Testing is complete and passed, SDG&E moves to set up the Functional Evaluation Testing.

5. SDG&E Performs Functional Evaluation Testing	
Description	SDG&E Distributed Energy Resources (DER) team performs functional evaluation testing.
Vendor Activities	Coordination with SDG&E (and other utilities as needed) for functional testing at vendor site or utility site. Provide support for any DER team-related inquiries.
Documents Required	No additional documents.
SDG&E Activities	Review test plan with vendor and adjust as needed to test specific equipment. Conduct safety and functional testing; identify any gaps for additional testing as needed.

Once SDG&E approves the Metering Evaluation Testing, the SDG&E DER team initiates evaluation testing of the device. This phase typically involves assessing the device's operational safety, adherence to industry standards, and overall technological reliability.

SDG&E will inform the vendor on or before ninety (90) days of the Functional Evaluation Testing results. If the device does not meet minimum requirements during the evaluation phase, it may be disapproved, and the vendor will be notified of the next steps.

Depending on the device, SDG&E may elect to run a pilot program prior to full approval or denial of the MSA for program implementation.

Approval & Deployment

6. Complete Memorandum of Understanding (MOU)	
Description	SDG&E drafts the MOU for vendor to review and sign.
Vendor Activities	Vendor to provide SDG&E with final MSA field configuration guidelines and specification sheet. Vendor to review, approve, and sign MOU drafted by SDG&E.
Documents Required	Final MSA field configuration guidelines and specification sheet.
SDG&E Activities	SDG&E drafts MOU and sends it to the vendor for review, approval, and signature.

The vendor shall provide final MSA field configuration guidelines and specification sheets to SDG&E. Once those are reviewed and approved by SDG&E, SDG&E will draft the MOU for the vendor within thirty (30) business days. Once the MOU is signed by both parties, SDG&E will add the MSA to the SDG&E **Approved MSA Product List** and facilitate field installation of approved devices per the MOU agreement.

7. Add MSA to Approved Product List	
Description	SDG&E adds MSA to the SDG&E Approved MSA Product List.
Vendor Activities	None.
Documents Required	None.
SDG&E Activities	SDG&E adds MSA to the SDG&E Approved MSA Product List, and updates appropriate MSA guides and customer application portals.

Once the MSA is added to the SDG&E Approved MSA Product List, SDG&E will update and publish the appropriate MSA guides and customer application portals to allow field deployment in SDG&E's service territory.

8. MSA is Available for Field Deployment

Description	MSA is on SDG&E Approved Product List and associated portals for customer application.
Vendor Activities	None.
Documents Required	None.
SDG&E Activities	None.

The MSA will be available for customer isolating or non-isolating applications for field deployment, and SDG&E will facilitate field installation of approved devices per the MOU agreement.

Frequently Asked Questions (FAQs)

1. What is required to start a device evaluation?

Vendors are required to submit a completed MSA Intake Form and supporting documentation via email to **ServiceStandards@sdge.com**. In addition, physical items, such as the production-ready MSAs and accessories listed in the Product and Equipment Checklist on the Intake Form need to be sent via mail to the Service Standards team at the specified address.

2. What is the process flow for device evaluation and how long does it typically take?

The evaluation process consists of three main phases:

1. SDG&E reviews Vendor Request: Thirty (30) business days
2. SDG&E performs Evaluation Testing: Ninety (90) days
3. SDG&E issues draft MOU: Thirty (30) business days from final documentation being received.

3. What if the device does not meet the minimum requirements during the evaluation?

If the device does not meet the minimum requirements during any phase, it may be disapproved, and the vendor will be notified of the next steps. Depending on the issue, SDG&E will work with the vendor toward a resolution.

4. Will I receive feedback after the initial vendor request?

Yes, you will be informed if your device moves to the next phase based on the results of the initial SDG&E review.

5. Can I submit additional documents after the initial review?

Yes, additional documentation may be submitted after the initial review as necessary.

6. Who can I contact if I have questions during the submission process?

For any questions, you may contact the Service Standards team via email **ServiceStandards@sdge.com** or reach out to your designated contact person within SDG&E.

7. What types of devices are eligible for evaluation?

Any new isolating or non-isolating Meter Socket Adapters can be submitted for evaluation, provided they meet the necessary criteria outlined in the MSA requirements.

8. Is there a specific format required for the documentation submitted?

While there is no specific format mandated, all documents should be clear, concise, and organized to facilitate an efficient review. Unorganized, unclear, or missing documentation can lead to delays in the evaluation process.

9. How can vendors help the SDG&E evaluation process complete faster?

Vendors should provide all documentation and production-ready equipment needed to perform the evaluation process upfront. Missing documentation, equipment, or equipment accessories could delay the evaluation process timeline. In addition, Vendors should be available to provide SDG&E additional documentation or information upon request throughout the process.

10. How can vendors ensure timely responses from SDG&E during the evaluation process?

Vendors can ensure timely responses by providing complete and accurate documentation, addressing any requests for additional information promptly, and maintaining open communication with SDG&E contacts.

11. Are there any fees associated with the evaluation process?

There are no associated fees or costs involved in the evaluation process. The vendor is expected to supply at least two production-ready MSA devices for testing and evaluation, which can be returned to the vendor after evaluation testing.

12. What criteria does SDG&E use to assess the safety and functionality of the device?

SDG&E typically evaluates devices based on operational safety, compliance with industry standards, and the reliability of the technology.

13. Can a vendor participate in the evaluation process if the device is still in development?

SDG&E requires fully developed, tested, and NRTL-approved devices for evaluation.

14. What actions should be taken if there are changes to the device during the evaluation process?

Vendors must notify SDG&E immediately of any changes to the device specifications, technology, or functionality, as this may impact the evaluation process. Depending on the changes to the device, the evaluation process may require restarting from the intake phase.

15. Can vendors expect regular updates during the evaluation process?

SDG&E will typically provide updates at key milestones in the evaluation process; however, vendors can inquire about the status at any time.

