

AUC Rule 004: Tariff Billing Code Working Group Meeting Summary

Meeting date May 29, 2014 **Time** 9 a.m. to 12 p.m.

Location Video conference AUC offices **Facilitator** AUC staff
 Tenth Floor, 10055 - 106 Street
 Edmonton
 Fourth Floor, 425 First St. S.W.
 Calgary

Teleconference
 Phone: 1-866-792-1318
 Conference code: 8665992

1 Introductions

Name	Company
Linda Kinnee	AltaGas Utilities Inc.
Steve Lai	AltaGas Utilities Inc.
Jacquie Zabiran (via telephone)	ATCO Electric Ltd.
Jessica Laird (via telephone)	ATCO Electric Ltd.
Carol Benoit	ATCO Gas
Shannon Rittmeyer	ATCO Gas
Anne Glass	AUC
Raymond Lee	AUC
Robert Thomas	AUC
Mathew Morgan	AUC
Bettyann Skagen (via telephone)	Battle River REA
Ralph Steendam	CAREA/EQUS REA Ltd.
Lori Harnack	Cognera Corp.
Karen Cooke (via telephone)	Direct Energy
Trevor Martin (via telephone)	Direct Energy
Donna Sanderow	Encana Corporation
John Hutchison	ENMAX Commercial Services Inc.
Carla Pitura	ENMAX Encompass
Leo Scarcelli	ENMAX Power Corporation
Sue Boyd	ENMAX Power Corporation
Hala Elsaadi	EPCOR Distribution & Transmission Inc.
Christine Harkness	EPCOR Distribution & Transmission Inc.
Shirley Kwan	EPCOR Energy Alberta Inc.
Deb Crossman	FortisAlberta Inc.
Tina Dulguerov	FortisAlberta Inc.
Angela Corsi	FortisAlberta Inc.

2 Review action items and comments received from March 5, 2014, meeting

- Section 2.12, All distributors to review their ability to provide the distributor invoice in a searchable format.
 - It was confirmed at the meeting that all distributors are able to provide invoices in OCR recognizable format.
- Table 2-1, Table Ref ID 2 related to transmission-connected site charge in tariff bill file.
 - All participants agreed to the proposed change as stated: “Last calendar day of the month following the charge period.”
 - The issue regarding first of the month enrolment restrictions will be referred back to the Rule 021 and Rule 028 working group for discussion.
- Table 2-2, Table Ref ID 1.
 - It was confirmed that the figure should be “95 per cent.” This correction will be reflected in the upcoming rule.
- The need to make TSW transactions mandatory.
 - Distributors indicated that the number of tariff billing sites withheld is relatively small, at roughly less than one per cent per month.
 - In most cases, retailers currently receive emails from distributors advising them of the tariff billing status for those withholding sites for an extended period of time.
 - Some retailers indicated that the current emailing method is sufficient for them to communicate with the customers regarding the tariff billing issue. Others indicated that a transaction would allow the information to flow through to the systems, making it available to the call centre reps for answering customer inquiries.
 - Distributors indicated that the cost would be significant to them, if TSW transactions become mandatory.
 - No agreement was reached as to whether there is a need to make TSW transactions mandatory.

ACTION: AUC will open a RIM issue on whether to make TSW transactions mandatory. Distributors and retailers are encouraged to provide their comments on this issue by June 30, 2014.

- REA code update.
 - AUC staff informed the group that EQUUS REA has been assigned REA code 0130. EQUUS REA indicated that it has no concerns with the assigned code.

ACTION: AUC will update the REA code table, found on the AUC website, for EQUUS REA, 0130.

3 Discussion on RIM issue 524 – Cancels and rebills of charges more than a year old

- AUC staff tabled an example of cancel/rebill. Prior to the meeting, it had been proposed that, since there is a requirement for two years data retention, a one-time charge would not be necessary if the adjustment was for less than two years. The example made it clear that one-time charges may still be required to perform off-sets.

- When a one-time charge is utilized because the original TBF format is no longer available online, distributors have various methods of calculating the one-time charge and communicating it to the impacted retailer(s). Some distributors have broken down the charge by customer, month or charge period. While other distributors have the calculation details consolidated in a spreadsheet.
- Retailers requested a copy of this spreadsheet from distributors so that they can investigate the impact and cost of using a spreadsheet for one-time charges on the cancel/rebill.
- Some parties indicated that the main driver causing cancel/rebills is from the crossed-meters situation on the electric side, not much from the gas side. Distributors also indicated that, on an annual basis, the number of adjustments is very small.
- Retailers present at the meeting expressed that the most important item to standardize was to ensure that the cancel and rebill occurred in the same file and that the one-time charges are broken down into the respective charge periods.

ACTION: Distributors are to forward retailers examples of one-time charge adjustments and spreadsheets that were sent along with them. Retailers are to investigate the impact and the cost of using the spreadsheet for the one-time charge adjustments and provide comment by June 30, 2014, for discussion purposes at the next Rule 004 working group meeting.

4 Discussion on RIM issue 523 – Non-TBD disputes

- From an enforcement perspective, there are no rules requiring that distributors or retailers must correct billing or account errors.
- It was pointed out that the cause of non-TBD disputes could be due to a breakdown of communication between retailers and distributors.
- Both retailers and distributors indicated that they have not encountered too many issues so far. Should the instance of issues become more frequent, industry will bring it to AUC's attention.

ACTION: AUC to close the RIM issue 523.

5 Other topics

- Another point that was discussed at the meeting was around tariff billing events in response to a previous request by one of the retailers to have a mandatory tariff bill period event at month end in addition to month end usage splits (mandatory). Due to high preliminary estimated cost to add the additional requirement it was decided that this request will not be pursued.

6 Work plan and timelines

The next Rule 004 meeting will be in mid-July 2014. AUC staff will communicate meeting details and materials to all participants before June 30, 2014.