

AUC Rule 004 (version 2.0): Alberta Tariff Billing Code Rules – Proposed changes for 2015

[Stakeholder: 1772387 Alberta Limited Partnership (Encor), Alberta Utility Billing Inc., ATCO Gas, Cognera Corp. (Cognera), EPCOR ENERGY Alberta (EEA), ENMAX Power Corporation (EPC), AltaGas Utilities Inc. (AUI), Utilities Consumer Advocate (UCA)]

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
1 General and administrative provisions	1.1 Application	<p>These rules sets out the minimum obligations a distributor under the Commission’s jurisdiction must meet to provide timely and accurate tariff bill-ready information to retailers for distribution and system access service provided by the distributor to the retailer.</p> <p>Retailers that carry out the function of an RSP under the Commission’s jurisdiction will be required to comply with the provisions of this rule. Prior to the Commission investigating any complaint from a retailer concerning the performance of a distributor under the rule, the retailer must demonstrate its compliance in accepting and exchanging tariff bill-ready information in the format set out in the rule.</p>	<p>(1) This rule sets out the minimum obligations an owner of an electric distribution system, as defined in the <i>Electric Utilities Act</i>, or a gas distributor, as defined in the <i>Gas Utilities Act</i>, must meet to provide timely and accurate tariff bill-ready information to retailers and to its regulated rate provider, as defined in the <i>Electric Utilities Act</i>, or its default supply provider, as defined in the <i>Gas Utilities Act</i>, for distribution and system access service.</p> <p>(2) When an owner of an electric distribution system is also acting as the regulated rate provider, adherence to the provisions of this rule is not required for</p>	ATCO Gas: In favour	
				AUI: AUI has no concerns with the proposed changes	
				Cognera: No comment	
				EEA: EEA has no concerns.	
				Encor: Encor has no concerns	
				EPC: ENMAX Power Supports	

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			<p>transactions between the owner of an electric distribution system as distributor and an owner of an electric distribution system as regulated rate provider. When a gas distributor is also acting as the default supply provider, adherence to the provisions of this rule is not required for transactions between the gas distributor as distributor and gas distributor as default supply provider.</p> <p>(3) A regulated rate provider that is authorized by an owner of an electric distribution system or a default supply provider that is authorized by a gas distributor is required to comply with the provisions in this rule.</p> <p>(4) A retailer, as defined in the <i>Electric Utilities Act</i> or in the <i>Gas Utilities Act</i>, is not required to comply with the provisions in this rule. However, prior to the Commission investigating any complaint from a retailer concerning the performance of a</p>		

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			<p>distributor under this rule, the retailer must demonstrate its compliance in accepting and exchanging tariff bill-ready information in the format set out in this rule.</p> <p>(5) The provisions of this rule do not apply when a distributor invoices a customer directly pursuant to Section 3 of the <i>Billing Regulation, 2003</i> or Section 3 of the <i>Natural Gas Billing Regulation</i>.</p>		
	1.2 Definitions		Changes to a number of definitions to align with AUC Rule 021 and Rule 028.	<p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: No comment</p> <p>EEA: EEA has no concerns</p> <p>Encor: Encor has no concerns</p> <p>EPC: ENMAX Power Supports</p>	
	NEW 1.3 Common abbreviations	None	Add Section 1.3, Common abbreviations.	<p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: No comment</p>	

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				EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power Supports	
2 Summary of Tariff Billing Code obligations	2.1 Present direct charges by distributor	This code does not apply to a distributor invoicing a customer directly pursuant to Section 3 of the <i>Billing Regulation</i> of the <i>EUA</i> or pursuant to Section 3 of the <i>Natural Gas Billing Regulation</i> .	Rename Section 2: Summary of Rule 004 obligations Move "Present direct charges by distributor" Section 2.1 to Section 1.1(5). Re-number Section 2.1 accordingly.	ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes Cognera: No comment EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power Supports	
	2.2.1 Distributor-initiated communication	Section 2.2.1 Distributors are obligated to communicate the following: 1) To the Commission a) Their code compliance plan and self-certification statement as prescribed in sections 6.1 and 7 respectively b) Their usage estimation methodology and tolerance thresholds	Section 2.1.1 (1) Distributors are obligated to communicate the following to the Commission: 1) To the Commission (a) Their rule code compliance plan and self-certification statement as prescribed in Section 6.1 and Section 7 of this rule, respectively. (b) Their current	ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes Cognera: No comment EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power Supports	

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		<p>and any changes to these. Distributor information pertaining to this subject is presented in Appendix A.</p> <p>c) Their process for attributing time to usage transactions (in particular with respect to events such as meter changes or upgrades) and how this is reported as whole days for billing purposes. Distributor information pertaining to this subject is presented in Appendix C.</p> <p>d) Their process for adjusting tariff charges that were originally based on estimated usage following receipt of measured usage. Distributor information pertaining to this subject is presented in Appendix D.</p> <p>e) Their process for adjusting tariff charges for pre-implementation periods. Distributor information pertaining to this</p>	<p>operating practices as they relate to the following:</p> <p>i. (b) Their usage estimation methodology and tolerance thresholds and any changes to these since last communicated to the Commission. Distributor information pertaining to this subject is presented in Appendix A.</p> <p>ii. (e) Their process for attributing time to usage transactions (in particular with respect to events such as meter changes or upgrades) and how this is reported as whole days for billing purposes. Distributor information pertaining to this subject is presented in Appendix C.</p> <p>iii. (d) Their process for adjusting tariff charges that</p>		

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		<p>subject is presented in Appendix E.</p> <p>f) Their process for cutover to the code standards, including plans for archiving and retrieval of historical data.</p> <p>g) Standard codes relevant to a distributor's presentation of tariff bill-ready charges as set out in Appendix B.</p> <p>h) Quarterly performance reports according to Section 2.15.</p> <p>i) The changes to REA Codes relevant to the distributor's service territory as set out in Appendix B.</p> <p>Information communicated to the Commission will be made publicly available via the Commission's website www.auc.ab.ca.</p> <p>2) To retailers</p> <p>a) Changes to the tariff bill calendar file within the timeframe prescribed in Table 2-1.</p>	<p>were originally based on estimated usage following receipt of measured usage. Distributor information pertaining to this subject is presented in Appendix D.</p> <p>iv. (e) Their process for adjusting tariff charges for pre-implementation periods. Distributor information pertaining to this subject is presented in Appendix E.</p> <p>iv. (f) Their process for cutover to the code standards, including plans for archiving and retrieval of historical data.</p> <p>(c) (g) Standard codes relevant to a distributor's presentation of tariff bill-ready charges as set out in Appendix B A.</p> <p>(h) Quarterly performance reports according to</p>		

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		<p>b) Restatement of tariff charges as a result of unexpected metering or billing errors.</p> <p>c) Exact location of the tariff bill calendar and site cycle catalogue files on their website, as well as any additional information necessary to enable download of these files.</p> <p>d) Approach to cancelling/rebilling of previously sent tariff charges. Distributor information pertaining to this subject is presented in Appendix G.</p> <p>e) Ability or limitations to their ability, to process CSA transactions that are backdated. Distributor information pertaining to this subject is presented in Appendix H.</p> <p>f) Inability to produce a tariff bill file as per their published tariff bill calendar file.</p> <p>g) Changes to site</p>	<p>Section 2-15.</p> <p>(d) (i) The changes to REA codes relevant to the distributor's service territory as set out in Appendix B A.</p> <p>Information communicated to the Commission will be made publicly available via the Commission's website www.auc.ab.ca.</p> <p>2) Distributors are obligated to communicate the following to retailers:</p> <p>(a) Changes to the tariff bill calendar file within the timeframe prescribed in Table 2-1.</p> <p>(b) Restatement of tariff charges as a result of unexpected metering or billing errors.</p> <p>(c) Exact location of the tariff bill calendar and site cycle catalogue files on their website, as well as any additional information necessary to enable download of</p>		

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		<p>cycle assignments forecasted to affect the lesser of 3% or 1000 sites within an electric distributor's territory in a billing month within the timeframe prescribed in Table 2-1.</p> <p>h) Changes to site cycle assignments to affect every site within a gas distributor's territory that changes billing cycles.</p>	<p>these files.</p> <p>(d) Approach to cancelling/rebilling of previously sent tariff charges. Distributor information pertaining to this subject is presented in Appendix G.</p> <p>(e) Ability or limitations to their ability, to process CSA transactions that are backdated. Distributor information pertaining to this subject is presented in Appendix H.</p> <p>(d) (f) Inability to produce a tariff bill file as per their published tariff bill calendar file.</p> <p>(e) (g) Changes to site cycle assignments forecasted to affect the lesser of 3% three per cent or 1,000 sites within an electric distributor's territory in a billing month within the timeframe prescribed in Table</p>		

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			2-1. (f) (h) Changes to site cycle assignments to affect every site within a gas distributor's territory that changes billing cycles.		
	2.2.2 Retailer-initiated communication	Section 2.2.2(1) c) Quarterly performance reports according to Section 2.15.	Section 2.1.2(1) e) Quarterly performance reports according to Section 2.15.	ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes Cognera: No comment EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power Supports	
	2.2.3 Commission-initiated communication	2.2.3 Commission-initiated communication The Commission is responsible for communicating the following to distributors and retailers: a) Changes to standard codes relevant to a distributor's presentation of tariff billing information b) Changes to Municipality ID information, and a) Changes to REA Code information	2.1.3 Commission-initiated communication The Commission is responsible for communicating the following to distributors and retailers: (a) Changes to standard codes relevant to a distributor's presentation of tariff billing information. (b) Changes to distributor operating practices. (c) b Changes to Municipality ID information, and	ATCO Gas: In favour Cognera: No comment EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power Supports	

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			(d) Changes to REA Code information.		
	2.12 Link tariff billing to distributor invoicing	<p>Section 2.1² Link tariff billing to distributor invoicing</p> <p>Prior to finalizing tariff charges on a distributor's invoice, a distributor must provide time, as prescribed in Table 2-1 of this code, to enable a retailer to take receipt of a tariff bill file, perform standard file format validation tests, and notify the distributor of test results. Upon receipt of notification from a retailer transmitting a TBA or TBR transaction, or the expiry of the prescribed timeframe, a distributor is obligated to fulfill its processing responsibilities as prescribed in Section 3.1 of this code. If the distributor receives notification of positive test results, does not receive negative test results within the prescribed timeframe as stated in Table 2-1 of this code, or determines that negative test results are invalid, the distributor may proceed with distributor invoicing.</p> <p>To enable retailers to perform reconciliation between tariff billing and distributor invoice processing, a</p>	<p>Section 2.1¹ Link tariff billing to distributor invoicing</p> <p>(1) Prior to finalizing tariff charges on a distributor's invoice, a distributor must provide time, as prescribed in Table 2-1 of this rule code, to enable a retailer to take receipt of a tariff bill file, perform standard file format validation tests, and notify the distributor of test results. Upon receipt of notification from a retailer transmitting a tariff bill accept (TBA) or a tariff bill reject (TBR) transaction, or the expiry of the prescribed timeframe, a distributor is obligated to fulfill its processing responsibilities as prescribed in Section 3.1 of this rule code. If the distributor receives notification of positive test results, does not receive negative test results within the prescribed timeframe as stated in Table 2-1 of this rule code, or determines that</p>	ATCO Gas: In favour	
AUI: AUI has no concerns with the proposed changes					
EEA: EEA has no concerns					
Encor: Encor has no concerns					
EPC: ENMAX Power Supports					

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		<p>distributor must include in its distributor invoice a unique identifier for the invoice (e.g., invoice number), as well as, a cross-reference to the tariff bill files (e.g., record ID of tariff bill file header record) relating to that invoice. Tariff charges not attributable to a site, or in cases where the current retailer was not the retailer of record for the period of time in which the charges occurred, will not be included in a tariff bill file and will be presented as a separate charge, accompanied by supporting detail, in the distributor's invoice or in another invoice. A tariff bill file is limited to one retailer and may only contain information for the periods when the recipient retailer is the retailer of record.</p>	<p>negative test results are invalid, the distributor may proceed with distributor invoicing.</p> <p>(2) To enable retailers to perform reconciliation between tariff billing and distributor invoice processing, a distributor must include in its distributor invoice a unique identifier for the invoice (e.g., invoice number), as well as, a cross-reference to the tariff bill files (e.g., Record ID of Tariff Bill File Header record) relating to that invoice. Tariff charges not attributable to a site, or in cases where the current retailer was not the retailer of record for the period of time in which the charges occurred, will not be included in a tariff bill file and will be presented as a separate charge, accompanied by supporting detail, in the distributor's invoice or in another invoice. A tariff bill file is limited to one retailer and may only contain information for the periods when the recipient retailer is</p>		

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			<p>the retailer of record.</p> <p>(3) Distributor invoices must use "TBI" as the three-letter abbreviation for the transaction name, and the file must be in portable document format (PDF), not comma-separated values format (CSV), and must be electronically searchable using optical character recognition (OCR) technology. The distributor invoice must be sent to the retailer via the standard transaction transport method for electronic data exchange for the electric and gas utility industry.</p>	<p>Cognera: While Cognera would prefer TBI data to be provided via file transaction, we recognize the extensive industry debate that has led to the current recommendation and can align with this change.</p>	<p>Acknowledged</p>
	<p>2.14 Monitor performance</p>	<p>2.14 Monitor performance</p> <p>The market participants to whom this code applies (see section 1.5) are required to:</p> <p>1) structure their tariff billing processes and systems in a manner that allows them to achieve the time-based performance requirements outlined in Table 2-1; and</p> <p>c) monitor their performance of code</p>	<p>2.13 Monitor performance</p> <p>The market participants to whom this code rule applies (see Section 1.15) are required to: 1) structure their tariff billing processes and systems in a manner that allows them to achieve the time-based performance requirements outlined in Table 2-1; and</p> <p>2) monitor their performance of code obligations against the metrics presented in Table 2-2</p>	<p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: No comment</p> <p>EEA: EEA has no concerns</p> <p>Encor: Encor has no concerns</p> <p>EPC: ENMAX Power Supports</p>	

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		<p>obligations against the metrics presented in Table 2-2 below. Prior to June 1, 2008, market participants to whom this code applies may use Table 2-2, Performance Monitoring Metrics, set out in EUB Directive 12, <i>Alberta Tariff Billing Code</i>, version 1.3, dated December 15, 2006 to monitor their performance of code obligations; and provide monthly performance results to the Commission on a quarterly basis. The process and form for reporting performance results to the Commission are established outside of this code and are available on the Tariff Billing Code page of the Commission website www.auc.ab.ca.</p>	<p>below. Prior to June 1, 2008, market participants to whom this code applies may use Table 2-2, Performance Monitoring Metrics, set out in EUB Directive 12, <i>Alberta Tariff Billing Code</i>, version 1.3, dated December 15, 2006 to monitor their performance of code obligations; and provide monthly performance results to the Commission on a quarterly basis. The process and form for reporting performance results to the Commission are established outside of this code and are available on the Tariff Billing Code page of the Commission website www.auc.ab.ca.</p>		
	<p>Table 2-1 Performance Requirements</p>	<p>Table 2-1. Performance Requirements Table Ref ID 1, Tariff bill file publication timing Measure: Number of days between the scheduled read date and the scheduled tariff bill file published date for a billing cycle, as stated</p>	<p>Table 2-1. Performance requirements Table Ref ID 1a, Tariff bill file publication timing Measure: Number For all sites other than transmission-connected sites: Number of days between the scheduled read</p>	<p>ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes Cognera: No comment EEA: EEA has no concerns Encor: Encor has no</p>	

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		in the tariff bill calendar file. Responsibility: Distributor Target: Maximum: 6 business days	date and the scheduled tariff bill file published date for a billing cycle, as stated in the tariff bill calendar file. Responsibility: Distributor Target: Maximum: 6 six business days	concerns EPC: ENMAX Power Supports	
		None	Table 2-1. Performance requirements Table Ref ID 1b, Tariff bill file publication timing Measure: For transmission-connected sites: time limit to transmit a transmission-connected site's charges. Responsibility: Electric Distributor Target: Maximum: last calendar day of the month following the charge period	ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes Cognera: No comment (codifies current practice) EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power Supports	
		Table 2-1. Performance Requirements Table Ref ID 8, Dispute resolution timing Measure: Number of business days following receipt of a TBD transaction to resolve the dispute by transmitting a cancel and/or rebill, provided that the TBD transaction was accepted. Responsibility: Distributor Target :	Table 2-1. Performance requirements Table Ref ID 8, Dispute resolution timing Measure: Number of business days following receipt of a TBD transaction to resolve the dispute by transmitting a cancel and/or rebill (or a cancel without a rebill in circumstances where there will never be a rebill), provided that the TBD transaction was accepted. (Note: in	ATCO Gas: In favour Cognera: No comment EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power Supports	

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		<p>Minimum: 1 elapsed business day</p> <p>Mean: 5 elapsed business days for 95% of disputes</p> <p>Maximum: by next scheduled bill file publish date for the site</p>	<p>exceptional circumstances, the rebill may be based on an estimate.)</p> <p>Responsibility: Distributor</p> <p>Target:</p> <p>Minimum: 1 elapsed business day</p> <p>Mean: 5 elapsed business days for 95% per cent of disputes</p> <p>Maximum: 35 calendar days for 100 per cent of disputes by next scheduled bill file publish date for the site</p>		
		<p>Table 2-1. Performance Requirements</p> <p>Table Ref ID 12, Gas Site cycle change notice</p> <p>Measure: Notification period for every site within a gas distributor's territory that changes billing cycles.</p> <p>Responsibility: Gas Distributor</p> <p>Target: Minimum: 20 calendar days</p>	<p>Table 2-1. Performance requirements</p> <p>Table Ref ID 12, Gas Site cycle change notice</p> <p>Measure: Notification period for every site within a gas distributor's territory that changes billing cycles.</p> <p>Responsibility: Gas Distributor</p> <p>Target: Minimum: 20 30 calendar days</p>	<p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: No comment</p> <p>EEA: EEA has no concerns</p> <p>Encor: Encor has no concerns</p> <p>EPC: N/A</p>	
		<p>Table 2-1. Performance Requirements</p>	<p>Table 2-1. Performance requirements</p>	<p>ATCO Gas: In favour</p>	

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		<p>Table Ref ID 13, Bill production timing for withheld sites</p> <p>Measure: Number of business days required to transmit a site's charges in an off-cycle tariff bill file for a site that was previously withheld from its scheduled tariff bill file.</p> <p>Responsibility: Distributor</p> <p>Target: ...Maximum: within two billing cycles (i.e., by the next following scheduled tariff bill file publish date for that site)</p>	<p>Table Ref ID 13, Bill production timing for withheld sites</p> <p>Measure: Number of business calendar days required to transmit between a site's charges in an off-cycle inclusion in a tariff bill file for a site that was previously withheld from its scheduled tariff bill file or between the transaction date of the SMC showing energization and inclusion in its first tariff bill file.</p> <p>Responsibility: Distributor</p> <p>Target: ...Maximum: 70 calendar days between a site's tariff bills within two billing cycles (i.e., by the next scheduled tariff bill file publish date for that site)</p>	<p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: No comment</p> <p>EEA: EEA has no concerns</p> <p>Encor: Encor has no concerns</p> <p>EPC: ENMAX Power Supports</p>	
		None	<p>Table 2-1 Performance Requirements</p> <p>Table reference ID 17, Distributor current operating practice (as per Section 2.1.1) change notice after specific project details and timelines are known</p> <p>Number of months' notice prior to implementation</p> <p>Responsibility: Distributor</p>	<p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: No comment</p> <p>EEA: EEA has no concerns</p>	

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			Target: Minimum: one months' notice prior to implementation	Encor: Encor has no concerns	
				EPC: ENMAX Power Supports	
		Table 2-2. Performance monitoring metrics Table Ref ID 1	Moved table reference ID 1 and 2 from Table 2-2 to the end of Table 2-1 (as table reference ID 18 and 19). Delete the rest of Table 2-2.	ATCO Gas: In favour	
			Table 2-1 Performance Requirements Move Table Ref ID 1 from Table 2-2 to Table 2-1 to become: Table Ref ID 18: Requirement: Currency of tariff bill file content Measure: Percentage of all sites with a site production reason code of "2020" (regular billing cycle) published in original tariff bill files, where the number of business days from the current bill period end date for each site to the tariff bill file date created is less than or equal to eight business days. ³	AUI: AUI has no concerns with the proposed changes	
				Cognera: No comment	
				EEA: EEA has no concerns	
				Encor: Encor has no concerns	
			Formula: Percentage of sites billed and coded regular billing cycle that are billed within the required eight business days =	EPC: ENMAX Power supports – Will the AUC update Rule 002 section 4.1.4 to be consistent with the updated rule 004 metric?	The AUC plans to update Rule 002 accordingly.

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			<p>[(number of sites within original tariff bill files with a site production reason code of "2020" where the tariff bill file date created minus the current bill period end date for each site is less than or equal to eight business days) ÷ (the total number of sites with a site production reason code of "2020" in original tariff bill files – ineligible sites)] x 100</p> <p>Where:</p> <p>Ineligible site = site that was initially energized after its scheduled read date for the month</p> <p>Number of sites within original tariff bill files with a site production reason code of "2020" (regular billing cycle), where the tariff bill file date created minus the current bill period end date for each site is less than or equal to eight business days, divided by the total number of sites with that same site production reason code in original tariff bill files.</p> <p>Responsibility: Distributor</p> <p>Target: 95 % per cent of sites</p> <p>Footnote 3 reads: Distributors are exempt from including sites belonging to</p>		

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			<p>a seasonal bill cycle (e.g. irrigation) during the off-season (i.e. when the site is idle) and from including sites dependent on transmission tariff information from the ISO when reporting their performance for this metric.</p>		
		<p>Table 2-2. Performance monitoring metrics Table Ref ID 2</p>	<p>Moved table reference ID 1 and 2 from table 2-2 to the end of table 2-1 (as table reference ID 18 and 19). Delete the rest of table 2-2. Table 2-1. Performance requirements Move Table Ref ID 2 from Table 2-2 to Table 2-1 to become: Table Ref ID 19: Requirement: File completeness Measure: Percentage of all sites assigned to billing cycles transmitted in original tariff bill files with a site production reason code of "2020" (regular billing cycle) on their scheduled tariff bill file publish date as stated in the tariff bill calendar file. Formula: Percentage of sites expected to bill on each billing cycle that are billed and coded regular billing cycle on their scheduled tariff bill file</p>	<p>ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes Cognera: No comment EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power supports – Will the AUC update Rule 002 section 4.1.4 to be consistent with the updated rule 004 metric?</p>	<p>The AUC plans to update Rule 002 accordingly.</p>

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			<p>publish date = [(number of sites assigned to billing cycles and transmitted in original tariff bill files on their scheduled tariff bill file publish date with a site production reason code of "2020") ÷ (total number of sites expected to bill for those billing cycles – ineligible sites)] x 100</p> <p>Where:</p> <p>Ineligible site = site that was initially energized after its scheduled read date for the month</p> <p>Number of sites assigned to billing cycles and transmitted in original tariff bill files on their scheduled tariff bill file publish date with a site production reason code of "2020" (regular billing cycle), divided by the total number of sites expected to bill for those billing cycles.</p> <p>Responsibility: Distributor</p> <p>Target: 98 % per cent of sites</p>		
	2.15 Measurement and reporting protocol		Delete Section 2.15, Measurement and reporting protocol.	ATCO Gas: In favour	
				AUI: AUI has no concerns with the proposed changes	

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				Cognera: No comment	
				EEA: EEA has no concerns	
				Encor: Encor has no concerns	
				EPC: ENMAX Power supports	
	2.16 Data retention	2.16 Data retention Distributors are obligated to retain tariff billing data in its original format for a minimum of two (2) years, after which time information used in the derivation of tariff billing data must be retained for an additional five (5) years.	2.14 Data retention (1) Distributors are obligated to retain tariff billing data in its original format for a minimum of three years, after which time A distributor is allowed to retain tariff billing data in its original format for two years if it provides multiple One-Time Charge records that align with the charge periods when performing cancels and rebills of charges, as described in Section 5.4.4, spanning beyond the period that the distributor has tariff billing data in its original format. (2) Distributors are obligated to retain tariff billing data in its	ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes Cognera: While Cognera would prefer all cancels and rebills to be provided in original format, we recognize the extensive industry debate that has led to the current recommendation and can align with this change. Note: Please cross-reference 4.3.9 (4), and 5.4.4 for working alignment regarding PPAC charge periods (i.e. one-time charges aligning to charge periods). EPC: ENMAX Power Supports	Please see AUC response in Section 4.3.9(4).

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			original format for a minimum of two (2) years, after which time information used in the derivation of tariff billing data must be retained for an additional five (5) years a minimum of seven years.		
3 Summary of Tariff Billing Code obligations	3.1.1 Distributor responsibilities	3) If actual metering data spanning the scheduled billing period are not available, usage information is estimated for the appropriate tariff bill periods in accordance with a distributor's usage estimation process (see Appendix A).	(3) If actual metering data spanning the scheduled billing period is are not available, usage information is estimated for the appropriate tariff bill periods in accordance with a distributor's usage estimation process (see Appendix A) as filed with the Commission.	ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes Cognera: No comment EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power supports	
	3.2 Tariff billing events	<p>Section 3.2 has been reformatted. As such, Section 3.2(4) has become Section 3.2(2)(d).</p> <p>The associated footnote reads:</p> <p>A charge period event should result in a universal split of all charge records, irrespective of charge component (combination of tariff cross-reference code, component category code, component type code, component basis code and step number). However, due</p>	<p>In the re-formatted Section 3.2(2)(d), the associated footnote to read:</p> <p>A charge period event should result in a universal split of all charge records, irrespective of charge component (combination of tariff cross-reference code, component category code, component type code, component basis code and step number). However, due to system limitations, FortisAlberta cannot universally split charge</p>	ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes Cognera: No comment EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power Supports	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
		to system limitations, FortisAlberta cannot universally split charge component records as a result of a charge period event.	component records as a result of a charge period event.		
		<p>Table 3-1. Tariff billing events</p> <p>Table Ref ID 5, Customer Switch</p> <p>Description: A CSA is sent from a retailer to a distributor as a result of one of the following:</p> <ul style="list-style-type: none"> Customer move in/ move out Retailer terminates a contract for provision of electric services.⁶ <p>Associated footnote reads: Unique circumstances for ENMAX Energy Corporation only – otherwise termination of electric services results in an enrollment/ deenrollment transaction between retailers.</p>	<p>Table 3-1. Tariff billing events</p> <p>Table Ref ID 5, Customer Sswitch</p> <p>Description: A CSA is sent from a retailer to a distributor as a result of one of the following:</p> <ul style="list-style-type: none"> customer move in / move out Retailer terminates a contract for provision of electric services.⁶ <p>Delete associated footnote: Unique circumstances for ENMAX Energy Corporation only – otherwise termination of electric services results in an enrollment/ deenrollment transaction between retailers.</p>	<p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: No comment</p> <p>EEA: EEA has no concerns</p> <p>Encor: Encor has no concerns</p> <p>EPC: ENMAX Power Supports</p>	
		None	<p>Table 3-1. Tariff billing events</p> <p>Table Ref ID 19:</p> <p>Tariff Billing Event: Calendar month end</p> <p>Description: The last day of</p>	<p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: No comment</p> <p>EEA: EEA has no concerns</p>	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
			a month has occurred. Tariff Bill File Event: N Tariff Bill Period Event: O Usage Period Event: M Charge Period Event: O	Encor: Encor has no concerns EPC: ENMAX Power Supports	
4 Summary of Tariff Billing Code obligations	4.1 Information exchange	The standards presented in the following sections are intended to be as specific as practical to facilitate data exchange between distributors and retailers. At the same time, the Commission recognizes that problems or issues may arise with individual market participants during system implementation and/or changes in market structure that would necessitate an adjustment to the standards. The Commission may consider revising these standards upon presentation of a documented need to do so by a market participant. The Commission may also grant a market participant a temporary exemption (as prescribed in section 6.1) from these standards, provided that the deviation from the standards is necessary and reasonable and the resulting effect on the operation of the market is minimal.	The standards presented in the following sections are intended to be as specific as practical to facilitate data exchange between distributors and retailers. At the same time, the Commission recognizes that problems or issues may arise with individual market participants during system implementation and/or changes in market structure that would necessitate an adjustment to the standards. The Commission may consider revising these standards upon presentation of a documented need to do so by a market participant. The Commission may also grant a market participant a temporary exemption (as prescribed in section 6.1) from these standards, provided that the deviation from the standards is necessary and reasonable and the resulting effect on the operation of the market is minimal.	ATCO Gas: In favour	
				AUI: AUI has no concerns with the proposed changes	
				Cognera: No comment	
				EEA: EEA has no concerns	
				Encor: Encor has no concerns	
				EPC: ENMAX Power Supports	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
	4.3.1 General tariff bill file rules	<p>7) Gas distributors will disclose totalized sites as a single site representing totalized usage, demand, and miscellaneous determinants for all meters for the same tariff bill periods.</p> <p>8) Gas distributors will disclose subtract metered sites as a single site representing net usage, demand, and miscellaneous determinants for primary and subtract meters for the same tariff bill periods.</p> <p>9) Distributors are obligated to release tariff bill file(s) containing all the sites in a tariff billing cycle on the scheduled tariff bill file publish date stated in the tariff bill calendar file, with the exception of any sites withheld from tariff bill file production. In addition, any sites subjected to a tariff billing event that requires the production and presentation of off-cycle tariff charges must also be included within the timeframe prescribed in Table 2-1.</p> <p>10) In subsequent sections, the following terms</p>	<p>Insert the following two subsections as new Section 4.3.1(7) and Section 4.3.1(8), and re-number subsequent subsections.</p> <p>(7) Electric distributors are not required to disclose all of the billing determinants nor charge details for transmission-connected sites, provided additional information in the form of a copy of the AESO invoice or the output from the AESO calculation tool is provided to the retailers at the same time the summarized tariff bill file charges are sent to the retailers.</p> <p>(8) Where the retailer of record changes for a transmission-connected site mid-month or a customer switch occurs for a transmission-connected site mid-month, the electric distributor is obligated to bill the retailer of record at month-end the full calendar month's charges. The electric distributor shall not split the charges at the retailer switch or at the</p>	<p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: While Cognera would prefer all data be provided via file transaction, we recognize the extensive industry debate that has led to the current recommendation and can align with this change.</p> <p>However, Cognera believes the AESO tariff needs to accommodate mid-month enrols/de-enrols to ensure customers are billed correctly and would prefer to see the tariff structure addressed vs. applying all charges to the owner on the last day of the month. Cognera recognizes that distributors cannot accommodate this change without updates to the AESO tariff structure.</p> <p>EEA: EEA has no concerns</p> <p>Encor: Encor has no concerns</p>	<p>Acknowledged</p>

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
		apply: a) Mandatory – must be populated for every record. b) Conditional – populated according to stated production rules. c) Optional – populated at a distributor’s discretion.	<p>customer switch.</p> <p>9) 7) Gas distributors will disclose totalized sites as a single site representing totalized usage, demand, and miscellaneous determinants for all meters for the same tariff bill periods.</p> <p>10) 8) Gas distributors will disclose subtract metered sites as a single site representing net usage, demand, and miscellaneous determinants for primary and subtract meters for the same tariff bill periods.</p> <p>11) 9) Distributors are obligated to release tariff bill file(s) containing all the sites in a tariff billing cycle on the scheduled tariff bill file publish date stated in the tariff bill calendar file, with the exception of any sites withheld from tariff bill file production. In addition, any sites subjected to a tariff billing event that requires the production and presentation of off-cycle tariff charges must also be included within the timeframe prescribed in Table 2-1.</p> <p>12) 10) In subsequent</p>	EPC: ENMAX Power Supports	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
			sections, the following terms apply: a) Mandatory – must be populated for every record. b) Conditional – populated according to stated production rules. c) Optional – populated at a distributor's discretion.		
	4.3.5 Determinants – usage	Table 4-5, Usage determinant content Usage Amount field (Sequence 16) Description: ... If Meter Type equals 'C' then, where metering information has been provided, Usage Amount must be within 0.5 kWh of the result of the following calculation: ...	Table 4-5, Usage Determinant record content Usage Amount field (Sequence 16) Description: ...If Meter Type = "C" then, where metering information has been provided, Usage Amount must be within 0.5 kWh or one GJ of the result of the following calculation: ...	ATCO Gas: In favor AUI: AUI has no concerns with the proposed changes Cognera: No comment EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power Supports	
	4.3.9 One-time	Production rules	Production rules	ATCO Gas: In favour	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
	charge	(4) Where tariff charges apply, the one-time charge records disclosed in a tariff bill file should fall within the current billing period dates specified in the site header record. One-time charges for a previous billing period could be presented in a subsequent billing period but should only occur on an exception basis.	(4) Where tariff charges apply, the one-time charge One-Time Charge records disclosed in a tariff bill file should fall within the current billing period dates specified in the site header Site Header record. One-time charges for a previous billing period could be presented in a subsequent billing period but should only occur on an exception basis, or in the case where a cancel and rebill is for periods beyond the distributors data retention period and the date in the Charge Date field of the One-Time Charge record does not correspond to the charge period being corrected, each distributor must include the code "PPAC" (prior period adjustment code) in its OCF.	<p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: Note: Please cross-reference 2.14 (1), and 5.4.4 for working alignment regarding PPAC charge periods (i.e. one-time charges aligning to charge periods). Note: Cognera requests that charge dates are explicitly addressed during implementation discussions to ensure charges can be processed by receiving retailers.</p> <p>EEA: EEA would like to recommend that supporting details are provided to ensure charges are applied to the correct customer affected by PPAC adjustments. Calculation details should include:</p> <ul style="list-style-type: none"> - Charge Period 	<p>For consistency and clarification purposes, the AUC will change 4.3.9(4) to read as follows:</p> <p>(4) Where tariff charges apply, the One-Time Charge records disclosed in a tariff bill file should fall within the current billing period dates specified in the Site Header record. One-time charges for a previous billing period could be presented in a subsequent billing period but should only occur on an exception basis, or in the case where a cancel and rebill is for periods beyond the distributors' data retention period as required under Section 5.4.4.</p> <p>The AUC will hold an AUC Rule 004 Industry Consultation follow-up meeting to discuss implementation details.</p> <p>Please see AUC response above.</p>

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
				<ul style="list-style-type: none"> - Usage - Total charges <p>These details are a minimum requirement. EEA may require a further breakdown of the OTC into the respective line items (distribution, transmission, local access fee, and riders) when resolving customer escalations related to the OTC adjustment.</p> <p>EEA would like to recommend this be added to the rule. If this is not possible, it would be required as a part of the implementation meetings; where a template would be recommended for all distributors. This could be accessible on the AUC website.</p>	
				<p>Encor: Encor would like to recommend that supporting details are provided to ensure charges are applied to the correct customer affected by PPAC adjustments. Calculation details should include:</p> <ul style="list-style-type: none"> - Charge Period - Usage - Total charges <p>These details are a minimum requirement. Encor may require a further breakdown of</p>	<p>Please see AUC response above.</p>

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
				<p>the OTC into the respective line items (distribution, transmission, local access fee, and riders) when resolving customer escalations related to the OTC adjustment.</p> <p>Encor would like to recommend this be added to the rule. If this is not possible, it would be required as a part of the implementation meetings; where a template would be recommended for all distributors. This could be accessible on the AUC website.</p>	
		Not currently in production rules.	<p>Insert the following as production rules (5)(a) and (5)(b) and re-number subsequent subsection.</p> <p>(5)(a) Where a one-time charge is to recover costs for service work requested by a retailer who is no longer the retailer of record by the time the work is completed, the One-Time Charge record will be sent to the requesting retailer, subject to the exception provided in (5)(b).</p> <p>(5)(b) Where a one-time charge is to recover</p>	<p>Alberta Utility Billing Inc.: Alberta Utility Billing Inc. is not in agreement with the addition of Section 4.3.9(5)(b) regarding initial energize requests. During the June 5, 2012, Pending Retailer Orders at Customer Switch Industry Consultation meeting (see page 3 of the meeting summary), parties agreed, “However ENC and charges should always go to the retailer that initiated the transaction and not to the new retailer of record.” At that meeting, the group expressed that retailers who made the request should be responsible for the charges, whether for initial energizes or re-energizes.</p>	<p>In order to complete the transaction process, the requesting retailer (e.g. who sent the ENR) should receive a completion notice (ENC). Hence, the requesting retailer should receive the one-time-charge, rather than the retailer of record (in the case of a retailer switch before the completion of the service work requested). This process is consistent with AUC Rule 021. Accordingly, the AUC will change production rule (5) to the language that was agreed to at the March 5, 2014, Rule 004 Industry Consultation meeting. Section 4.3.9(5) to read as follows:</p> <p>(5) Where a one-time</p>

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
			<p>costs for an initial energize request, requested by a retailer who is no longer the retailer of record by the time the work is completed, the One-Time Charge record will be sent to the requesting retailer or the retailer of record.</p>	<p>Rule 021 requires that the energize completion transaction (ENC) must go to the requesting retailer. If the ENC is going to the requesting retailer but the charges go to a different retailer (the retailer of record), how will the retailer of record (should they receive the charge out of the blue) reconcile the one-time charges for initial energizes? The retailer of record would have no transaction (no ENR nor ENC) to allow them to explain the charges to the customer. Whereas the requesting retailer would have the fact that they made the request and that the work was completed as the basis of their charges to the customer.</p> <p>Both the charges and the completion transactions should go to the retailer that requested the energize.</p> <p>If the requesting retailer receives the charge and bills the end-use customer for the request, the end-use customer is aware that their site has energy flowing and should be willing to pay the charges, even if they have switched retailers.</p>	<p>charge is to recover costs for service work (e.g. energize requests) requested by a retailer who is no longer the retailer of record by the time the work is completed, the One-Time Charge record will be sent to the requesting retailer.</p>
				<p>EPC: ENMAX Power <u>does not support the change to point 5</u> as the proposed wording does</p>	<p>See AUC response above.</p>

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
				<p>not clarify which retailer should be billed. As per the minutes from the March 5 2014 Rule 004 meeting the agreed upon wording stated " It was suggested that within those confines it would be up to the distributor what date to use", therefore the charge could go to the previous retailer or the current retailer of record.</p> <p>Enmax Power would support the change to Point 5 if the wording was changed to read "Where a one-time charge is to recover costs for service work (e.g. energize requests) requested by a retailer who is no longer the retailer of record by the time the work is completed, the One-Time Charge record will be sent to the requesting retailer or the retailer of record"</p>	
	4.10 Customer Switch Advice	<p>Delete associated footnote to 4.10(2) (in original rule). This section has since been re-numbered to 4.10(1)(b). The associated footnote reads as follows:</p> <p>Unique circumstances for ENMAX Energy Corporation only—otherwise termination of electric services results in an enrollment/ de-enrollment transaction</p>	Delete associated footnote.	<p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: No comment</p> <p>EEA: EEA has no concerns</p> <p>Encor: Encor has no concerns</p>	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
		between retailers.		EPC: ENMAX Power Supports	
		Production rules 2) b) the end of the requested effective date if the distributor accepts backdated CSA transactions, as disclosed in Appendix H, and the requested effective date is within the boundaries established by the distributor.	Production rules (2) (b) the end of the requested effective date if the distributor accepts backdated CSA transactions, as disclosed in Appendix H, and the requested effective date is within the boundaries established by the distributor.	ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes Cognera: No comment EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power Supports	
	Table 4-18. Customer Switch Receipt (CSR)	Appendix B	All references to Appendix B have been changed to Appendix A	ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes Cognera: No comment EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power Supports	
	NEW 4.12 Tariff billing	Section F2.1 The TSW transaction	Section 4.12 The TSW transaction is an	Alberta Utility Billing Inc.: There is no need for the comma in the second	Agreed. Comma removed.

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
	sites withheld (TSW) transaction (Section F2.1 and Table F2-1 in Appendix F, Optional transactions being moved to 4.12)	enables a distributor to inform a retailer of sites withheld from presentation in a published tariff bill file in an automated fashion. This transaction is utilized to communicate to a retailer of standard content validation tests and production failures for a specific site. The contents of the TSW transaction are provided in Table F2-1.	optional transaction that enables a distributor to inform a retailer of sites withheld from presentation in a published tariff bill file in an automated fashion. This transaction is—can be utilized to communicate to a retailer failure of standard content validation tests and production failures for a specific site. It can also be used to communicate that a site is being withheld while investigations, adjustments or corrections are taking place that may impact the site’s billing. The contents of the TSW transaction are provided in Table 4-19.	sentence between retailer and failure. ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes; however, currently AUI does not use this transaction. Cognera: No comment EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power supports as long as the TSW remains an optional transaction.	
		Table F2-1 , Tariff Billing Sites Withheld (TSW) Transaction Content Production rules The following production rules apply for the TSW transaction: 1) Data contained within the TSW transaction must adhere to the field level rules stated in Table F2-1. 2) Distributors must submit a TSW transaction on the same day as the tariff bill file. 3) A TSW transaction	Move Table F2-1 to new Section 4.12 and renamed it Table 4-19 , Tariff billing sites withheld (TSW) transaction content Production rules The following production rules apply for the TSW transaction: (1) Data contained within the TSW transaction must adhere to the field level rules stated in Table 4-19. (2) Distributors must submit a TSW transaction on the same day as the	ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes; however, currently AUI does not use this transaction. Cognera: No comment EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power supports	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
		<p>should be created for each Site Withheld Reason Code that has occurred.</p> <p>4) Sites withheld are not included in the Tariff Bill File</p>	<p>tariff bill file.</p> <p>(3) A TSW transaction should be created for each reason code the site is being withheld.</p> <p>(4) Sites withheld are not included in the tariff bill file.</p>	<p>as long as the TSW remains an optional transaction</p>	
<p>5 Validation and exception handling</p>	<p>5.4.1 General Cancel/Rebill Production Rules</p>	<p>1) Cancels and rebills may be issued for tariff-based charges and one-time charges. The cancel and rebill of tariff-based charges is independent from the cancel and rebill of one-time charges for the same site and time period.</p> <p>2) Where possible, a distributor must attempt to send the tariff bill period or one-time charge rebill records in the same tariff bill file as the associated cancel records. Exceptions for prior period adjustments should be rare.</p> <p>3) Original or rebilled charges presented within a tariff bill file cannot be cancelled within the same tariff bill file (i.e., no redundant charge and cancel presentation).</p> <p>4) All cancel/rebills</p>	<p>(1) Cancels and rebills may be issued for tariff-based charges and one-time charges. The cancel and rebill of tariff-based charges is independent from the cancel and rebill of one-time charges for the same site and time period.</p> <p>(2) Where possible, A distributor must attempt to send the tariff bill period or one-time charge rebill records in the same tariff bill file as the associated cancel records. The only exception to this requirement is in circumstances when there will never be a rebill.</p> <p>(3) Original or rebilled charges presented within a tariff bill file cannot be cancelled within the same tariff bill file (i.e. no redundant charge and cancel</p>	<p>ATCO Gas: In favor</p> <p>AUI: AUI has no concerns with the proposed changes; however, currently AUI cannot facilitate the inclusion of all cancels and rebills in one TBF due to system limitations. This will be resolved with the implementation of a new billing/CIS system.</p> <p>AUI will require an exemption to section 5.4.1 (2) until its new billing system is implemented.</p> <p>AUI will send supplemental e-mail communication to Retailers to advise of multiple cancel and rebills.</p> <p>Cognera: While Cognera would prefer all data be provided via file transaction, we recognize the extensive industry debate that has led to the current recommendation and can align with this change.</p>	<p>Acknowledged. The AUC will hold an AUC Rule 004 Industry Consultation follow-up meeting to discuss implementation details.</p> <p>Acknowledged</p>

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
		<p>processed by a distributor must be sent to retailers as part of a tariff bill file according to the record production sequence outlined in Appendix B.</p>	<p>presentation).</p> <p>(4) All cancels and rebills identified and processed by a distributor within a three years of the original charges must be sent to retailers as part of a tariff bill file according to the record production sequence outlined in Appendix BA.</p> <p>(5) All cancels and rebills identified and processed by a distributor that extend beyond a distributor's data retention period or beyond the period of adjustment as defined in the distributor's terms and conditions must be sent to retailers as part of a tariff bill file according to the requirements in Section 5.4.4.</p> <p>(6) Cancels or cancels and rebills of tariff-based charges and one-time charges for site IDs no longer in use must use the site IDs contained in the original charge records.</p>	<p>EPC: ENMAX Power Supports</p>	
	<p>5.4.4 Charges Relating to Pre-</p>	<p>As each distributor is expected to implement unique data conversion</p>	<p>Delete Section 5.4.4, Charges Relating to Pre-implementation Periods.</p>	<p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns</p>	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
	implementation Periods	strategies, a standard approach to presenting adjustments for pre-implementation charges is not a requirement of this code. Appendix E outlines the process for the distributor to initiate and process adjustments for pre-implementation periods.		<p>with the proposed changes</p> <p>Cognera: No comment</p> <p>EEA: EEA has no concerns</p> <p>Encor: Encor has no concerns</p> <p>EPC: ENMAX Power Supports</p>	
	NEW 5.4.4 Cancels and rebills of charges spanning extended periods	None	<p>Section 5.4.4(1):</p> <p>In situations where cancels extend beyond the distributor's data retention period, and the distributor's terms and conditions and other rules and regulations support rebills for the entire period being cancelled, the distributor will:</p> <p>(a) Cancel as many charges as it has retained in their original format following the production rules described in Section 5.4.1.1.</p> <p>(b) Rebill those same charge periods following the production rules described in</p>	<p>Alberta Utility Billing Inc.: Alberta Utility Billing Inc. is concerned about situations where customers have been subject to errors made by distributors that go beyond the distributor's terms and conditions and the distributor is refusing to correct those errors because their terms and conditions permit it. Alberta Utility Billing Inc. suggests that the Commission, before approving any new distributor terms and conditions, thoroughly review their cancel and rebill terms to determine whether or not the limits in those terms and conditions may be harming customers.</p> <p>The language in this rule is satisfactory provided that the distributor's terms and</p>	Acknowledged

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
			<p>Section 5.4.1.1.</p> <p>(c) Create one or more one-time charge adjustments (as described in Section 4.3.9) that summarize the adjustments to charges that span the period beyond the data retention period. The distributor must include the code “PPAC” (prior period adjustment code) in its OCF to be used in the case where the date in the Charge Date field of the One-Time Charge record does not correspond to the charge period being corrected. Each One-Time Charge record must not include any adjustments for periods for which the retailer was not the retailer of record.</p> <p>(d) Communicate to the retailer the calculation details that support the charge adjustment and the reasons for</p>	<p>conditions are adequate for ensuring customers are treated fairly and reasonably.</p> <p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: While Cognera would prefer all data be provided via file transaction, we recognize the extensive industry debate that has led to the current recommendation and can align with this change.</p> <p>Note: Please cross-reference 2.14(1), and 4.3.9(4) for wording alignment regarding PPAC charge periods (i.e. one-time charges aligning to charge periods).</p>	<p></p> <p>Please see AUC response to Section 4.3.9(4).</p> <p>The AUC would like to clarify the use of “PPAC”.</p> <p>“PPAC” is only to be used in the OCF in the case where a cancel and rebill is for periods beyond the distributor’s data retention period <u>and</u> the date in the Charge Date field of the One-Time Charge record does not correspond to the charge period being corrected.</p> <p>“PPAC” is not to be used if the distributor can align the One-Time Charge records with the charge periods when performing cancels and rebills of charges, spanning beyond the period that the distributor has tariff billing data in its original format.</p> <p>In order for a distributor to retain tariff billing data in its original format for two years</p>

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			<p>the charge adjustment.</p> <p><i>Section 5.4.4(1) diagram</i></p> <p>Section 5.4.4(2):</p> <p>In situations where the charge periods to be cancelled extend beyond both the distributor's data retention period and the period supported by either the distributor's terms and conditions or by other rules or regulations for performing cancels and rebills, the distributor will:</p> <p>(a) Cancel as many charges as it has retained in their original format following the production rules described in Section 5.4.1.1.</p> <p>(b) Rebill those same charge periods following the production rules described in Section 5.4.1.1.</p> <p>(c) Create one or more one-time charge adjustments (as described in Section 4.3.9) that summarize the adjustments to charges that span the period beyond</p>	<p></p> <p>EEA: EEA would like to recommend that supporting details are provided with an OTC.</p> <p>Scenario 1:</p> <p>If the OTC spans multiple TBF periods, the minimum calculation details include:</p> <ul style="list-style-type: none"> - Charge Period - Usage - Total charges <p>This will provide EEA information to accurately adjust energy charges as monthly rates change.</p> <p>Scenario 2:</p> <p>If the OTC is separated by individual TBF periods, the minimum calculation details include:</p> <ul style="list-style-type: none"> - Usage - Total charges <p>This will provide EEA information to accurately</p>	<p>instead of three (as prescribed in Section 2.14), it must provide multiple One-Time Charge records that align with the charge periods when performing cancels and rebills of charges, as described in Section 5.4.4, spanning beyond the period that the distributor has tariff billing data in its original format.</p> <p>The AUC will hold an AUC Rule 004 Industry Consultation follow-up meeting to discuss implementation details.</p>

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
			<p>the data retention period and within the period to be adjusted. The distributor must include the code "PPAC" (prior period adjustment code) in its OCF to be used in the case where the date in the Charge Date field of the One-Time Charge record does not correspond to the charge period being corrected. Each One-Time Charge record must not include any adjustments for periods for which the retailer was not the retailer of record.</p>	<p>adjust energy charges as monthly rates change.</p> <p>These details are a minimum requirement. EEA may require a further breakdown of the OTC into the respective line items (distribution, transmission, local access fee, and riders) when resolving customer escalations related to the OTC adjustment.</p> <p>Same comments for Section 5.5.4(2) & (3)</p> <p>EEA would like to recommend this be added to the rule. If this is not possible, it would be required as a part of the implementation meetings; where a template would be recommended for all distributors. This could be accessible on the AUC website.</p>	
			<p>(d) Communicate to the retailer the calculation details that support the charge adjustment and the reasons for the charge adjustment.</p> <p><i>Section 5.4.4(2) diagram</i></p> <p><i>Section 5.4.4(3):</i></p> <p>In situations where cancels extend beyond the period for adjustment supported</p>	<p>Encor: Encor would like to recommend that supporting details are provided with an OTC.</p> <p>Scenario 1:</p> <p>If the OTC spans multiple TBF periods, the minimum calculation details include:</p> <ul style="list-style-type: none"> - Charge Period - Usage - Total charges <p>This will provide Encor</p>	<p>The AUC will hold an AUC Rule 004 Industry Consultation follow-up meeting to discuss implementation details.</p>

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
			<p>by the distributor's terms and conditions or by other rules and regulations but fall within the distributor's data retention period, the distributor will:</p> <p>(a) Cancel all of the charges following the production rules described in Section 5.4.1.1.</p> <p>(b) Rebill all of the charges following the production rules described in Section 5.4.1.1.</p> <p>(c) Reverse the financial impact of the cancels and rebills for those charge periods that are not to be adjusted using a series of one-time charges as described in Section 4.3.9. All dates in the Charge Date field in the One-Time Charge records must match the Charge Period End Dates in the rebilled charges, and there must be a One-Time Charge record for each charge</p>	<p>information to accurately adjust energy charges as monthly rates change.</p> <p>Scenario 2:</p> <p>If the OTC is separated by individual TBF periods, the minimum calculation details include:</p> <ul style="list-style-type: none"> - Usage - Total charges <p>This will provide Encor information to accurately adjust energy charges as monthly rates change.</p> <p>These details are a minimum requirement. Encor may require a further breakdown of the OTC into the respective line items (distribution, transmission, local access fee, and riders) when resolving customer escalations related to the OTC adjustment.</p> <p>Same comments for Section 5.5.4(2) & (3)</p> <p>Encor would like to recommend this be added to the rule. If this is not possible, it would be required as a part of the implementation meetings; where a template would be recommended for all distributors. This could be accessible on the AUC website.</p>	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
			<p>period. Each One-Time Charge record must not include any adjustments for periods for which the retailer was not the retailer of record.</p> <p><i>Section 5.4.4(3) diagram</i></p>	EPC: ENMAX Power Supports	
6	Readiness			Encor: Encor has no concerns	
7	Self-certification			Encor: Encor has no concerns	
8	Tariff bill-ready model	<p>It is contemplated that future versions of this code will provide standard procedures for the following:</p> <ol style="list-style-type: none"> 1) imposing an administrative charge on a retailer by distributors if the Commission considers the action or complaint of a retailer related to this code to be frivolous or vexatious; 2) application of marketwide standard usage estimation methodologies and tolerance levels; 3) aligning usage estimation methodology between settlement and tariff billing processes; 	Delete Section 8, Future code topics	ATCO Gas: In favour	
				AUI: AUI has no concerns with the proposed changes	
				Cognera: No comment	
				EPC: ENMAX Power Supports	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
		4) cancel/rebill processing to correct usage and tariff charges following the use of a usage estimate; 5) reporting, resolving, and/or escalating code-related infractions, including roles and responsibilities, contact information and the procedures for direct inquiry, direct complaint, and escalation to the Commission; 6) monitoring and reporting code compliance; 7) assessing penalties and awarding remedies for noncompliance; and 8) processing cancel/rebills > 365 days old for regulated rate customers.			
Appendix A Estimation Methodology & Validation Thresholds		Appendix A	Delete Appendix A (to be moved to the AUC website)	ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes Cognera: No comment EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
				Supports	
		Appendix B	Becomes Appendix B A	<p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: No comment</p> <p>EEA: EEA has no concerns</p> <p>Encor: Encor has no concerns</p> <p>EPC: ENMAX Power Supports</p>	
	B4.2.1 Files Transmitted Electronically	<p>B4.2.1 Files Transmitted Electronically</p> <p>TXN: three-letter abbreviation for the transaction name (e.g., Tariff Bill Accept = TBA) or file name (e.g., Tariff Bill File = TBF)</p> <p>Sender: ID of the sender (i.e., Distributor ID of the distributor responsible for the site(s) or Retailer ID)</p> <p>Recipient: ID of the recipient (i.e., Distributor ID of the distributor receiving the file or transaction or Retailer ID)</p> <p>YYYYMMDD: Date the file was created (e.g.,</p>	<p>A4.2.1 Files Transmitted Electronically</p> <p>TXN: three-letter abbreviation for the transaction name (e.g. Tariff Bill Accept = TBA) or file name (e.g. Tariff Bill File = TBF). This must be in uppercase.</p> <p>Sender: ID of the sender (i.e. Distributor ID of the distributor responsible for the site(s) or Retailer ID).</p> <p>Recipient: ID of the recipient (i.e. Distributor ID of the distributor receiving the file or transaction or Retailer ID)</p> <p>YYYYMMDD: Date the file was created (e.g.</p>	<p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: No comment</p> <p>EEA: EEA has no concerns</p> <p>Encor: Encor has no concerns</p> <p>EPC: ENMAX Power Supports</p>	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
		20041202) HHMISS: Time the file was created on a 24-hour clock (e.g., 192432)	20041202). HHMISS: Time the file was created on a 24-hour clock (e.g. 192432). .CSV or .csv		
	B4.2.2 Files Available for Download	B 4.2.2 Files Available for Download TXN: three-letter abbreviation for the transaction name (e.g., Tariff Bill Accept = TBA) or file name (e.g., Tariff Bill File = TBF) Sender: ID of the sender (e.g., Distributor ID of the distributor responsible for the site(s) or Retailer ID) YYYYMMDD: Date the file was created (e.g., 20041202) HHMISS: Time the file was created on a 24-hour clock (e.g., 192432)	A 4.2.2 Files Aa available for D ownload TXN: three-letter abbreviation for the transaction name (e.g. Tariff Bill Accept = TBA) or file name (e.g. Tariff Bill File = TBF). This must be in uppercase. Sender: ID of the sender (e.g. Distributor ID of the distributor responsible for the site(s) or Retailer ID). YYYYMMDD: Date the file was created (e.g. 20041202). HHMISS: Time the file was created on a 24-hour clock (e.g. 192432). .CSV or .csv	ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes Cognera: No comment EEA: EEA has no concerns Encor: Encor has no concerns EPC: ENMAX Power Supports	
	B5.11 Tariff Rate Code	Table B 5-8 Tariff Rate Code File (TRC) Content Tariff Rate Code field Description: MANDATORY FIELD – Code to identify a distributor’s approved tariff.	Table A 5-8 Tariff R ate C ode F ile (TRC) C ontent Tariff Rate Code field Description: MANDATORY FIELD Mandatory field – Code to identify a distributor’s approved tariff. Each code	ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes Cognera: No comment	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
			within the TRC file must be unique.	<p>EEA: EEA has no concerns</p> <p>Encor: Encor has no concerns</p> <p>EPC: ENMAX Power Supports</p>	
	B5.18 Tariff Cross Reference Codes	<p>Table B5-15 Tariff Cross Reference File (TRF) Content</p> <p>Tariff Rate Code field</p> <p>Description:</p> <p>MANDATORY FIELD – Code to identify a distributor’s approved tariff.</p>	<p>Table A5-15 Tariff Cross Reference code File (TRF) Content</p> <p>Tariff Rate Code field</p> <p>Description:</p> <p>MANDATORY FIELD Mandatory field – Code to identify a distributor’s approved tariff. Each code within the TRF file must be unique.</p>	<p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: No comment</p> <p>EEA: EEA has no concerns</p> <p>Encor: Encor has no concerns</p> <p>EPC: ENMAX Power Supports</p>	
	B5.21 Component Type Code	<p>Table B5-18 Component Type Code File (CTF) Content</p> <p>Distributor ID field</p> <p>Description:</p>	<p>Table A5-18 Component Type Code File (CTF) Content</p> <p>Distributor ID field</p> <p>Description:</p>	<p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: No comment</p> <p>EEA: EEA has no concerns</p>	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
		MANDATORY FIELD – Unique identifier for a distributor. This identifier must equal that of the distributor for whom the component type code applies.	MANDATORY FIELD Mandatory field – Unique identifier for a distributor. This identifier must equal that of the distributor for whom the component type code applies or, in cases where the distributor has multiple zones, this identifier may equal the Zone ID.	Encor: Encor has no concerns	
		Component Type Code field Description: MANDATORY FIELD – Standardized code to represent a distributor’s charge component.	Component Type Code field Description: MANDATORY FIELD Mandatory field – Standardized code to represent a distributor’s charge component. Each code within the CTF file must be unique.	EPC: EPC reuses Component Type Codes for the different zones it serves. I’m not sure that the revised wording in this section reflects this long standing practice of ours. Component Type Code field Suggested language: Standardized code to represent a distributor’s charge component. Each code within the file must be unique unless the distributor has multiple zones then the same code can be used.	In order allow for cases where the distributor has multiple zones, the AUC to change the description to read as follows: Mandatory field – Standardized code to represent a distributor’s charge component. Each code within the CTF file must be unique or, in cases where the distributor has multiple zones, the same component type code can be re-used for each of its zones.
	B5.22 One-Time Charge Code	B5.22 One-Time Charge Code Each distributor will maintain its respective One-Time Charge Codes via a One-Time Charge Code File (OCF) and provide this to the Commission for	A5.22 One-Time Charge Code Each distributor will maintain its respective one-time charge codes via a one-time charge code file (OCF) and provide this to the Commission for	ATCO Gas: In favour AUI: AUI has no concerns with the proposed changes Cognera: No comment	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
		<p>publication, to fulfill the requirements of the One-Time Charge Code field of the tariff bill file. The contents of the One-Time Charge Code File are shown in Table B5-19.</p> <p>Table B5-19 One-Time Charge Code File (OCF) Content</p> <p>Distributor ID field Description: MANDATORY FIELD – Unique identifier for a distributor. This identifier must equal that of the</p>	<p>publication, to fulfill the requirements of the One-Time Charge Code field of the tariff bill file. The contents of the OCF are shown in Table A5-19.</p> <p>Each distributor must include the code “PPAC” (prior period adjustment code) in its OCF to be used only in the case where a cancel and rebill is for periods beyond the distributor’s data retention period and the date in the Charge Date field of the One-Time Charge record does not correspond to the charge period being corrected. is not current and may not belong to the current customer, requiring further investigation by the retailer before including on the customer’s invoice.</p> <p>Table A5-19 One-Time Charge Code File (OCF) Content</p> <p>Distributor ID field Description: MANDATORY FIELD Mandatory field – Unique identifier for a distributor. This identifier must equal</p>	<p>EEA: EEA has no concerns</p>	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
		<p>distributor for whom the one-time charge code applies.</p> <p>One-time Charge Code field Description: MANDATORY FIELD – Standardized code to represent a distributors’ one-time charge.</p>	<p>that of the distributor for whom the one-time charge code applies or, in cases where the distributor has multiple zones, this identifier may equal the Zone ID.</p> <p>One-Time Charge Code field Description: MANDATORY FIELD Mandatory field – Standardized code to represent a distributors’ one-time charge. Each code within the OCF file must be unique.</p>	<p>EPC: EPC reuses One Time Charge Codes for the different zones it serves. I’m not sure that the revised wording in this section reflects this long standing practice of ours.</p> <p>One-Time Charge Code field Suggested language: Standardized code to represent a distributor’s charge component. Each code within the file must be unique unless the distributor has multiple zones then the same code can be used.</p>	<p>In order allow for cases where the distributor has multiple zones, the AUC to change the description to read as follows: Mandatory field – Standardized code to represent a distributors’ one-time charge. Each code within the OCF file must be unique or, in cases where the distributor has multiple zones, the same one-time charge code can be re-used for each of its zones.</p>
	B5.23 Miscellaneous Determinant Code	<p>Table B5-20 Miscellaneous Determinant Code File (MDF) Content</p> <p>Distributor ID field Description: MANDATORY FIELD – Unique identifier for a</p>	<p>Table A5-20 Miscellaneous Determinant Code File (MDF) Content</p> <p>Distributor ID field Description: MANDATORY FIELD Mandatory field – Unique</p>	<p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: No comment</p> <p>EEA: EEA has no concerns</p>	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response						
		<p>distributor. This identifier must equal that of the distributor or agent of the distributor for whom the miscellaneous determinant code applies.</p> <p>Miscellaneous Determinant Code field</p> <p>Description:</p> <p>MANDATORY FIELD – Standardized Code to represent a miscellaneous determinant disclosed in a tariff bill file.</p>	<p>identifier for a distributor. This identifier must equal that of the distributor or agent of the distributor for whom the miscellaneous determinant code applies or, in cases where the distributor has multiple zones, this identifier may equal the Zone ID.</p> <p>Miscellaneous Determinant Code field</p> <p>Description:</p> <p>MANDATORY FIELD Mandatory field – Standardized code to represent a miscellaneous determinant disclosed in a tariff bill file. Each code within the MDF file must be unique.</p>	<p>Encor: Encor has no concerns</p> <p>EPC: EPC reuses Miscellaneous Determinant Codes for the different zones it serves. I'm not sure that the revised wording in this section reflects this long standing practice of ours.</p> <p>Miscellaneous Determinant Code field</p> <p>Suggested language:</p> <p>Standardized code to represent a distributor's charge component. Each code within the file must be unique unless the distributor has multiple zones then the same code can be used.</p>	<p>In order allow for cases where the distributor has multiple zones, the AUC to change the description to read as follows:</p> <p>Mandatory field – Standardized code to represent a miscellaneous determinant disclosed in a tariff bill file. Each code within the MDF file must be unique or, in cases where the distributor has multiple zones, the same miscellaneous determinant code can be re-used for each of its zones.</p>						
	<p>NEW A5.28 Site withheld Reason code for the TSW</p>	<p>Table F2-2, Site Withheld Reason Codes</p> <table border="1" data-bbox="575 1312 911 1446"> <thead> <tr> <th data-bbox="575 1312 636 1446">Table Ref ID</th> <th data-bbox="636 1312 730 1446">Site Production Reason Code</th> <th data-bbox="730 1312 911 1446">Site Production Reason Code Name</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>	Table Ref ID	Site Production Reason Code	Site Production Reason Code Name				<p>Move table F2-2 to the end of Appendix A as Table A5-25 Site withheld reason codes.</p>	<p>ATCO Gas: In favour</p> <p>AUI: AUI has no concerns with the proposed changes</p> <p>Cognera: No comment</p>	
Table Ref ID	Site Production Reason Code	Site Production Reason Code Name									

Section	Subsection	Existing			Proposed changes	Stakeholder comment	AUC response
		1	2500	Site withheld due to failure of standard content validation tests		EEA: EEA has no concerns	
		2	2501	Site withheld due to failure of production validation tests		Encor: Encor has no concerns	
		3	2502	Site withheld due to tariff calculation errors		EPC: ENMAX Power Supports as long as the TSW remains an optional transaction	
		4	2503	Other			
Appendix C Description of Attributing Time to Meter Readings					Remove Appendix C (to be moved to the AUC website)	ATCO Gas: In favour	
						AUI: AUI has no concerns with the proposed changes	
						Cognera: No comment	
						EEA: EEA has no concerns	
						Encor: Encor has no concerns	
						EPC: ENMAX Power supports	
Appendix D Approach to Usage Estimate Corrections					Remove Appendix D (to be moved to the AUC website)	ATCO Gas: In favour	
						AUI: AUI has no concerns with the proposed changes	
						Cognera: No comment	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
				EEA: EEA has no concerns	
				Encor: Encor has no concerns	
				EPC: ENMAX Power supports	
Appendix E Pre-implementation Charge Presentation			Remove Appendix E (to be moved to the AUC website)	ATCO Gas: In favour	
				AUI: AUI has no concerns with the proposed changes	
				Cognera: No comment	
				EEA: EEA has no concerns	
				Encor: Encor has no concerns	
				EPC: ENMAX Power supports	
Appendix F Optional Transactions			Remove Appendix F (to be moved to the AUC website)	ATCO Gas: In favour	
				AUI: AUI has no concerns with the proposed changes	
				Cognera: No comment	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
				EEA: EEA has no concerns	
				Encor: Encor has no concerns	
				EPC: ENMAX Power supports	
Appendix G Cancel/Rebill Methodology			Remove Appendix G (to be moved to the AUC website)	ATCO Gas: In favour	
				AUI: AUI has no concerns with the proposed changes	
				Cognera: No comment	
				EEA: EEA has no concerns	
				Encor: Encor has no concerns	
				EPC: ENMAX Power supports	
Appendix H Cancel/Rebill Methodology			Remove Appendix H (to be moved to the AUC website)	ATCO Gas: In favour	
				AUI: AUI has no concerns with the proposed changes	
				Cognera: No comment	

Section	Subsection	Existing	Proposed changes	Stakeholder comment	AUC response
				EEA: EEA has no concerns	
				Encor: Encor has no concerns	
				EPC: ENMAX Power supports	
Appendix I Cancel/Rebill Methodology			Remove Appendix I (to be moved to the AUC website)	ATCO Gas: In favour	
				AUI: AUI has no concerns with the proposed changes	
				Cognera: No comment	
				EEA: EEA has no concerns	
				Encor: Encor has no concerns	
				EPC: ENMAX Power supports	
General comments	Utilities Consumer Advocate: UCA supports the changes to Rule 004 and has no further comments on the changes at this time.				