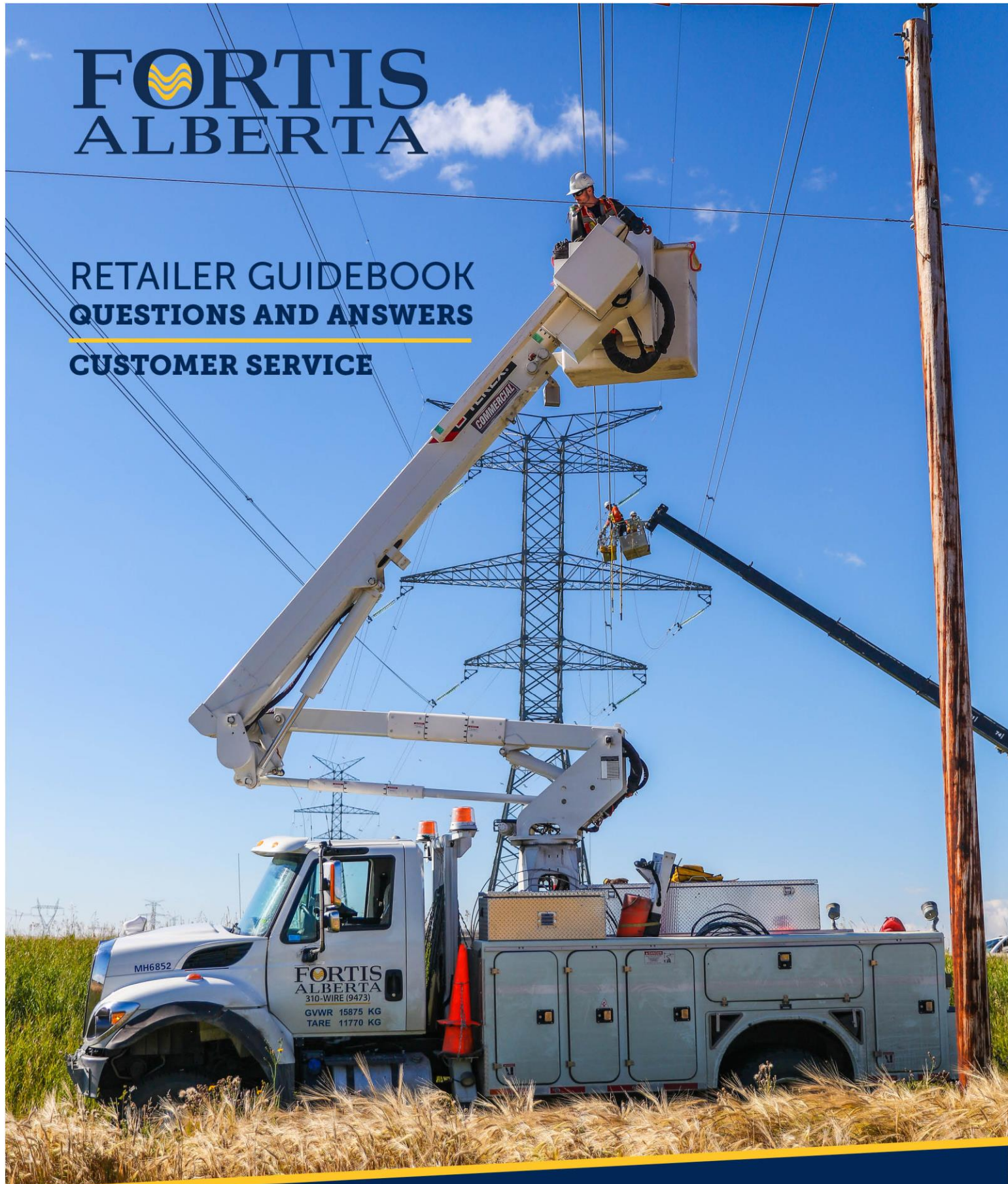




## RETAILER GUIDEBOOK QUESTIONS AND ANSWERS

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### CUSTOMER SERVICE



Updated September 2020

**MISSION**  **ZERO**  
Bring it Home Preventable Injuries

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## **Retail Inquiry Tracking System (RITS):**

### **1. What is a RITS ticket?**

RITS is an acronym for Retailer Information Tracking System and is designed for Retailers to communicate and track their questions or concerns to FortisAlberta. The individual who submits the RITS ticket will receive an e-mail notification with each update made by FortisAlberta. The RITS system is monitored closely to ensure timely resolution to Retailers with respect to their inquiries.

### **2. What is the Service Level Agreement (SLA) for RITS tickets?**

The SLA for RITS tickets is ten (10) business days (excluding adjustment requests). On occasion, a RITS tickets may take longer to resolve than the standard SLA due to complicated corrections or investigations. In these cases, the RITS ticket will be updated at least once every ten (10) business days until resolution is reached.

### **3. When and why should a Retailer create a RITS ticket?**

A Retailer should create a RITS ticket for questions or concerns that require FortisAlberta investigation. Examples are as follows:

- Missing AUC Rule 021, Rule 004 or Rule 010 transactions including, but not limited to: Daily Cumulative Meter (DCM), Site Metering Characteristics (SMC), De-Energize Completion (DEC) Energize Completion (ENC), Tariff Bill Reject Notification (TRN), or Customer Switch Receipt (CSR).
- Request to permanently disconnect and/or salvage a site that is already de-energized, or after 12 months of being de-energized classified as delinquent.
- Meter concerns including questionable reads and/or crossed meters.
- Investigation of an existing Site ID.
- Estimated final Wholesale Settlement Details (WSD).

### **4. What comments are required to include on a RITS ticket?**

To ensure RITS tickets are accurately allocated, it is crucial to include specific details applicable to the question or concern. The details must include a descriptive explanation of what the requestor is seeking and the specific timeline in which the question or concern falls. Other comments may include the file name that is in question or a secondary contact name and phone number.

### **5. Why would a RITS ticket be rejected?**

RITS tickets are rejected when the necessary comments outlined in question 4 (see above) are not met. Other rejection instances include but are not limited to the following:

- Incorrect contact name, missing phone number, or missing mailing address on salvage requests.
- The dictated timeline falls outside the parameters when the requesting Retailer is not the Retailer of Record for the site in question.
- If the Requestor asks that meter reads are adjusted beyond 1 year.
- A duplicate RITS is created for the same time frame.

### **6. How does a Retailer change the comments entered on an existing RITS ticket?**

Please e-mail FortisAlberta's Retail Support Team at [RetailSupport@FortisAlberta.com](mailto:RetailSupport@FortisAlberta.com) if the Requestor necessitates edits, changes or attachments on an existing RITS ticket.

## **7. When may I contact the Retail Support Team instead of creating a RITS ticket?**

The Retailer may contact the Retail Support Team via e-mail at [RetailSupport@FortisAlberta.com](mailto:RetailSupport@FortisAlberta.com) or by phone at (403) 514-4990 for questions pertaining to time-sensitive AUC Rule 021 transactions.

For example:

- De-Energize (DER)
- De-Energize Failure (DEF)
- Energize (ENR)
- Energize Failure (ENF)
- Request Off-Cycle Meter Read (ROR)
- Revoke De-Energize (RDR)
- Select Retailer Request (SRR)
- Update Customer Information (UCI)

## **8. When may I escalate a RITS ticket?**

Retailers may escalate RITS tickets for priority investigation to Retail Support Team for the following instances:

- An existing RITS ticket exceeds the ten (10) business day SLA completion of RITS tickets.
- A RITS ticket is closed with insufficient or inaccurate information.
- A RITS ticket has been escalated by a third party and a response is required prior to the ten (10) business day SLA for completing of RITS tickets.

## **9. How do I escalate a RITS ticket?**

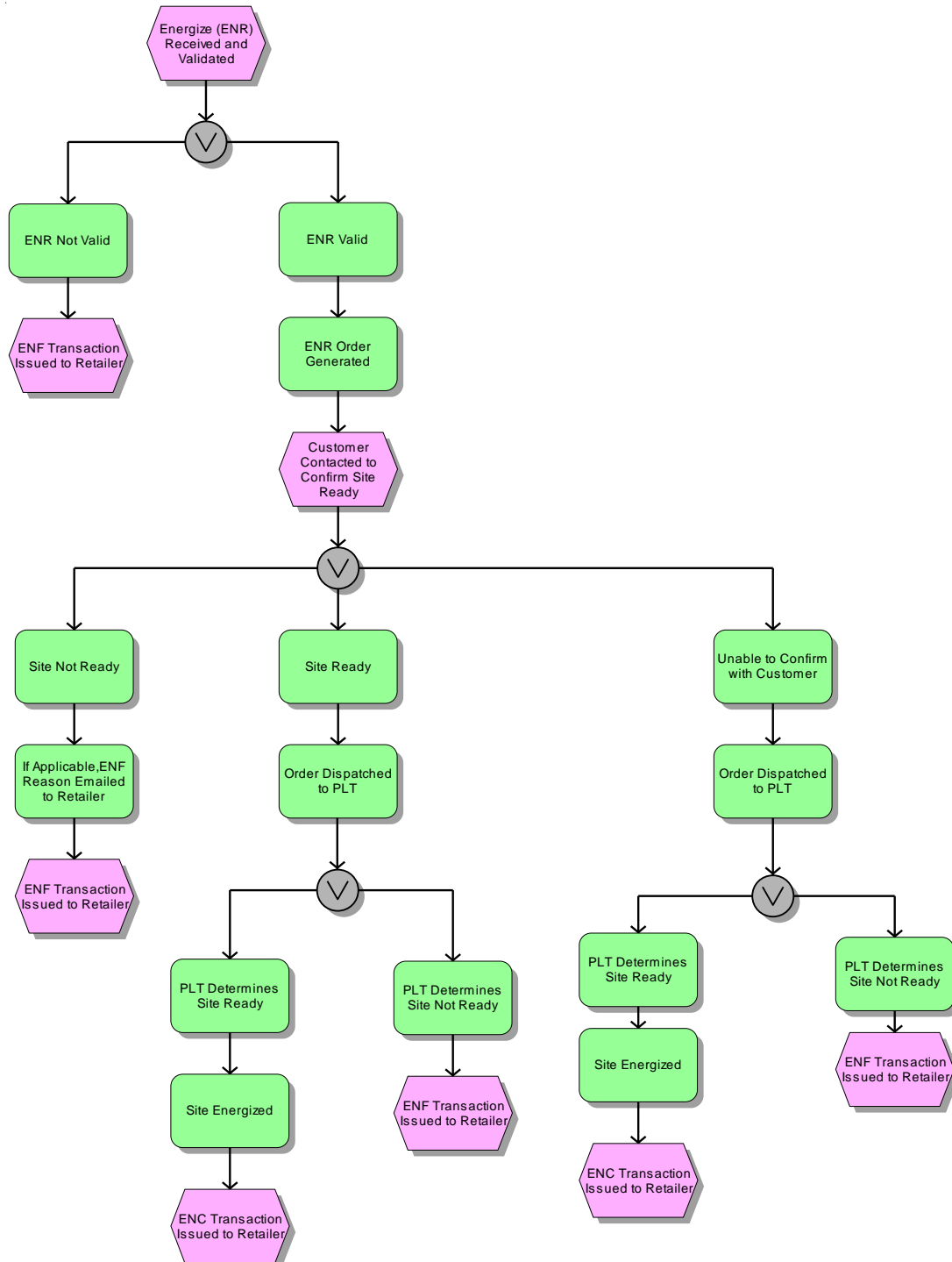
Please e-mail the Retail Support Team via e-mail at [RetailSupport@FortisAlberta.com](mailto:RetailSupport@FortisAlberta.com) or by phone at (403) 514-4990 to request that the RITS Ticket is re-opened with the supporting reasons why the investigation requires further analysis and review. The ticket will be re-opened and assigned to the appropriate department who will in turn complete the investigation and close the ticket with a resolution.

## Energize Request (ENR):

### 1. What is the definition of an ENR request?

A valid ENR request will initiate a site to be energized, a meter installed, or existing service reconnected.

### 2. What path does an ENR take until it is completed?





### 3. What is the SLA for meter install?

The SLA for a meter installation (including if a meter was removed for non-payment or vacant premise) is a Priority 3, which is three (3) business days from the time FortisAlberta receives the ENR transaction from the Retailer.

### 4. What transaction identifies the meter status?

The SMC transaction identifies the metering type and energize status of any given site. Field sequence 6 of the SMC transaction is the "Type of metering" field. If the value is "C" (cumulative meter) or "I" (interval meter) there is a meter on site. If the value is "L" (limited) there is a meter on site with limited power. If the value is "U" (unmetered) there is not a meter on site.

### 5. What are the priority codes for ENRs?

Priority Code	Description
1	<b>Urgent reconnect</b> – Reconnect completed within 24 hours; the hour the WSP receives the ENR is counted as hour zero. Additional fees may be charged by the WSP. There is no expectation that WSPs can meet this priority on non-business days. If the wrong code is used, the WSP shall treat it as if it had come in as a priority code 2 or 3.
2	<b>Rush reconnect</b> – Reconnect completed within 48 hours; the hour the WSP receives the ENR is counted as hour zero. Additional fees may be charged by the WSP. There is no expectation that WSPs can meet this priority on non-business days. If the wrong code is used, the WSP shall treat it as if it had come in as a priority code 3 or 4.
3	<b>Standard connection</b> – WSP's published standard level reconnect service; which will be completed in three (3) business days.
4	<b>New construction</b> – For energizing sites that have been under construction and have never had a meter installed. As Retailers may not always be aware when sites are under construction, mistakenly using priority codes 1, 2 or 3 when a site is under construction cannot be the basis for failing an ENR. When a WSP receives an ENR for a site under construction that was not coded as priority code 4, the WSP shall treat it as though it were coded as priority code 4.

### 6. What are the business and non-business hours for energization?

NORMAL BUSINESS HOURS:	NON-BUSINESS HOURS:
Monday to Friday, excluding holidays 8:00 AM to 4:00 PM.	Monday to Thursday 4:00 PM to 8:00 AM & Friday 4:00 PM to Monday 8:00 AM.

### 7. Can a Retailer request a Priority 1 or 2 ENR for a meter install request?

Retailers cannot change the priority of an ENR for a meter installation request because all new meter installations are treated with the same priority (Priority 3 which is three (3) business days) whether it's a new service installation or reinstalling a meter that was previously removed from an existing location.

### 8. What are the charges for Priority 1 and Priority 2 requests?

- FortisAlberta will post a reconnection fee of \$262 (excluding GST) for Priority 1 Reconnect requests.
- FortisAlberta will post a charge of \$120 (reconnect fee) + \$120 (rush connection fee) (excluding GST) for Priority 2 Reconnect requests.

Priority Code	Service Level	Fees applied
Priority 1	Completed within 24 hours	\$262
Priority 2	Completed within 48 hours	\$240
Priority 3	Completed within 3 Business Days	\$120
Priority 4	Completed within 3 Business Days	\$0 *New Construction only

These charges are found in the Appendix A – Fee Schedule of our **Customer/Retailer Terms and Conditions**, which are subject to change upon Alberta Utilities Commission (AUC) approval.

### 9. How does a Retailer change the Priority of a reconnect request during business and non-business hours?

DURING BUSINESS HOURS: MONDAY TO FRIDAY 7:30 AM – 4:00 PM:	OUTSIDE REGULAR BUSINESS HOURS:
The Retailer's Enrollment Team is to contact the FortisAlberta Retail Support Team (403) 514-4990 and send an e-mail to <a href="mailto:RetailSupport@FortisAlberta.com">RetailSupport@FortisAlberta.com</a> . The e-mail should include the Site ID, reason for the escalation, customer name and the Supervisor's name authorizing that the Retailer of Record will accept the charges.	The Retailer is to contact 310-WIRE (9473) and send an e-mail to <a href="mailto:RetailSupport@FortisAlberta.com">RetailSupport@FortisAlberta.com</a> and an e-mail to the 310-WIRE (9473) Customer Care Centre Representative prior to any action being taken. The e-mail must include the Site ID, reason for the Priority change, customer name and the Supervisor's name authorizing that the Retailer of Record will accept the charges.

### 10. How does a Retailer update an ENR with comments of appointment information?

The contents within the "Message to WSP" field of the ENR transaction is automatically transferred to the service order for FortisAlberta's field personnel. Retailers can make the following requests for our PLTs to contact the customer by using the one of the following unique four-digit codes:

- "0001": PLT to call prior to energizing the service.
- "0002": PLT to call to arrange an on-site meeting.

In addition to the four-digit codes, Retailers can enter up to one hundred (100) characters of text to provide additional contact names, phone numbers, dates or other relevant information for the FortisAlberta field personnel.

**11. How does a Retailer issue an ENR if customer contact is not required and the request to install the meter is within three (3) business days of the submitted transaction date?**

The Retailer issues an ENR transaction via VLTrader. Please do not enter comments in the "Message to WSP" field as the ENR will occur within three (3) business days.

**12. What is FortisAlberta's process once an ENR is received?**

FortisAlberta dispatches the ENR to the field to energize the service within the specified SLA.

**13. What is FortisAlberta's process if the customer is not ready for their meter?**

FortisAlberta will cancel the order, issuing an ENF transaction to the Retailer of Record. The customer is to contact their Retailer once the service is in fact ready for meter installation.

**14. How does a Retailer request a reconnection if the customer requested a temporary disconnection of service under 5 days through the Distributor?**

Please advise the customer to contact our toll-free Customer Care Centre at 310-WIRE (9473) or at 1-855-333-WIRE (9473). There is not an ENR reason code outlined in the AUC Rule 021 for a VLTrader transaction to reconnect a site that has been temporarily disconnected. If an ENR request is issued for the reconnect of a temporarily disconnected service, the order will be failed reason code "1203" - Already energized.

**15. What is the process for a site going from temporary power to permanent power?**

There are different variables when setting up a site for temporary and permanent power, see examples below:

- Current process for Residential Rates:

Customer should contact FortisAlberta Customer Care Center at 310-WIRE (9473) to request a temporary disconnect/reconnect to move the meter. The Customer Care Center creates a service order to the field. The Power Line Technician (PLT) moves the meter from the temporary spot to the permanent spot on the house. The meter that is used to supply power to build the house is the same type of meter that can be used to power the permanent service.

- Current process for all other rates:

Customer should contact FortisAlberta Customer Care Center at 310-WIRE (9473) to request a temporary to permanent service connection. The Customer Care Center will review our system of records:

- If FortisAlberta finds two (2) Site IDs, one that is being used by the temporary site and one that is not being used, FortisAlberta will provide the available Site ID to the customer. The customer will then need to call their Retailer to apply for power. FortisAlberta will salvage the temporary service only if it is no longer required.
- If FortisAlberta finds only one (1) Site ID or nothing at all, the Customer Care Center will create a request to the FortisAlberta Customer Connections Department. FortisAlberta will work with the customer and the Site ID Team to complete the temporary to permanent request. As a final step, the customer will contact their Retailer of choice to begin the enrollment process for the permanent service.

**16. When would a meter install request for an instrument metered service not meet the SLA of three (3) business days?**

The meter installation for an instrument metered service may take up to 30 days to complete. When FortisAlberta receives an ENR to energize an instrument metered service, two orders are

created within our system of record. The first order is to energize the service and will be completed by a PLT within three (3) business days. The second order is the meter installation order and will be completed by a Metering Technician within thirty (30) days. Once the second order is completed by the Metering Technician the Retailer will receive the ENC.

**17. Will the Retailer receive any flow through charges prior to receiving the ENC?**

The Retailer will receive flow through charges prior the ENC receipt if the site is newly constructed and the customer has not requested an ENR thirty (30) days post construction. In the event the service is not energized within thirty (30) days of construction, the Retailer of Record receives Rate Minimum charges until the time the service is energized.

If there is a delay in the ENC being issued, the consumption may be estimated back to the date when the service was originally energized, and those charges will flow through to the Retailer of Record.

**18. What are the common ENF reason codes and an example of each?**

REASON CODE:	DESCRIPTION:	EXAMPLE:
0027	Other – call distributor for details	<ul style="list-style-type: none"> <li>• See question 20 below</li> </ul>
0005	Invalid retailer ID	<ul style="list-style-type: none"> <li>• Site belongs to another Retailer other than the Retailer requesting for the ENR.</li> <li>• If the site has not been enrolled successfully by any Retailer.</li> </ul>
0013	Invalid site ID	<ul style="list-style-type: none"> <li>• Site ID in file is not valid.</li> </ul>
1203	Already energized	<ul style="list-style-type: none"> <li>• FortisAlberta's records identify site as energized. If Retailer sends a second ENR, the second will fail.</li> </ul>
1204	Requested Energize Date invalid – format, length, missing	<ul style="list-style-type: none"> <li>• Format in the Requested Energize Date field is invalid.</li> </ul>
1205	Distributor does not have infrastructure/not ready	<ul style="list-style-type: none"> <li>• Customer requires the transformer, wires and poles to be installed.</li> </ul>
1304	Customer – Construction not complete	<ul style="list-style-type: none"> <li>• Customer will need to request another ENR when their secondary construction is complete. *</li> </ul>

**Note:** The Retailer is required to send a new ENR transaction after receiving confirmation from the customer that the site is ready.

**19. If an ENF reason is undefined or unclear, how do I obtain a more detailed explanation?**

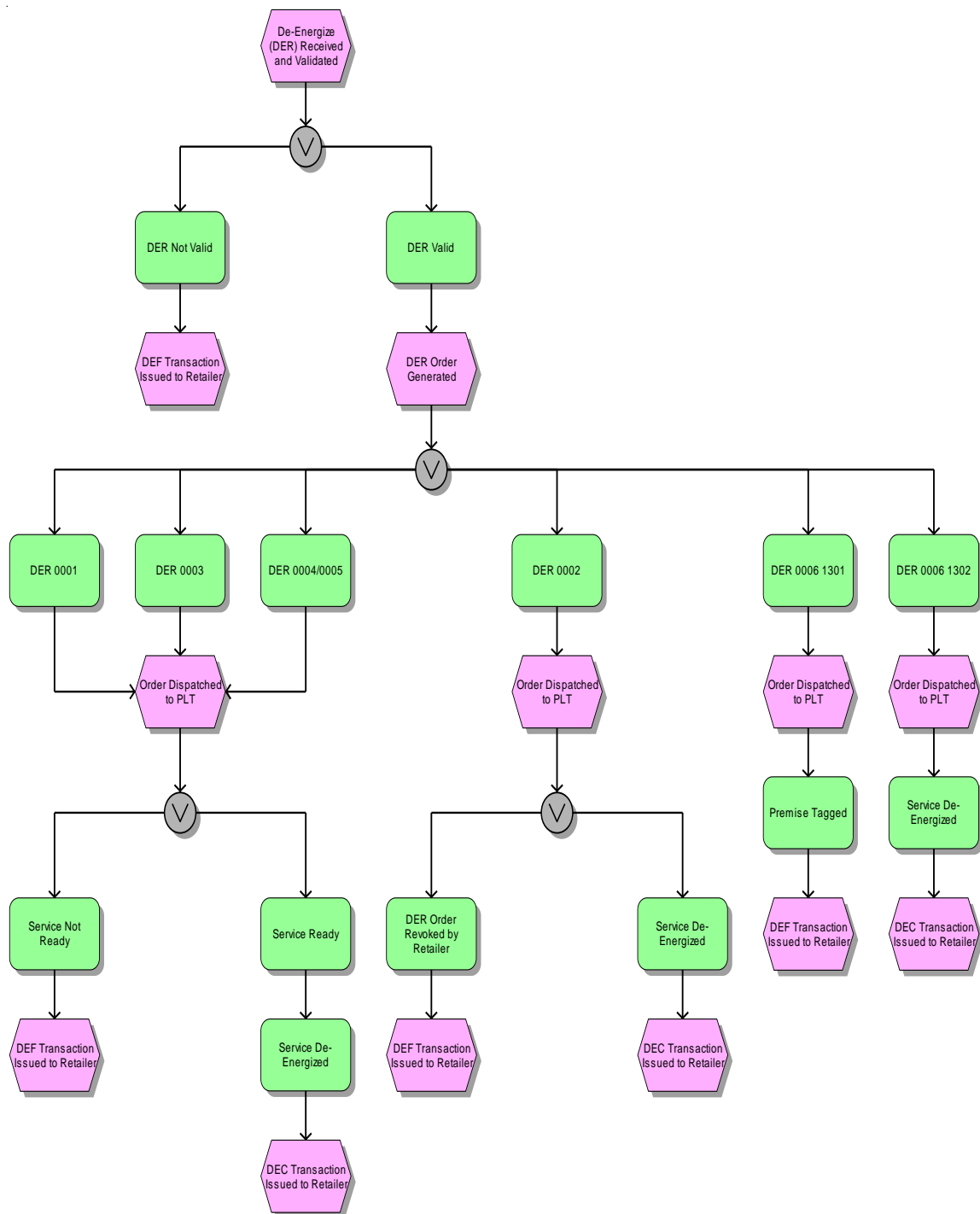
If the Retailer requires specifics regarding an ENF, including reason code "0027 – Other call distributor for details", please contact the Retail Support Team at (403) 514-4990 or via e-mail at [RetailSupport@FortisAlberta.com](mailto:RetailSupport@FortisAlberta.com).

## De-Energize Request (DER)

### 1. What is the definition of a DER request?

A valid DER request will initiate a site to be disconnected, to have the meter removed, to initiate the site to be placed on IDLE or to initiate the site to be salvaged.

### 2. What path does a DER take until it is completed?



### 3. What are the explanations of DER reason codes along with reasons to use each code?

REASON CODE:	DESCRIPTION:	EXAMPLE:
0001	Customer Request De-Energize	<ul style="list-style-type: none"> <li>Trailer is being moved off property</li> <li>Service no longer requires a meter on-site</li> <li>IDLE/Rate Minimums (other than Rate 11)</li> </ul>
0002	Cut Off for Non-Payment	<ul style="list-style-type: none"> <li>Delinquent Customer Account</li> </ul>
0003	Premise Demolished	<ul style="list-style-type: none"> <li>Building is being Demolished</li> <li>Meter and Service need to be permanently removed</li> </ul>
0004	Safety Shut Off	<ul style="list-style-type: none"> <li>If the meter was removed due to fire</li> <li>If Retailer or WSP is aware of meter tampering</li> </ul>
0005	Seasonal Shut Off	<ul style="list-style-type: none"> <li>If the service is disconnected and reconnected in less than 12 months from the de-energized date, there is a \$120.00 reconnect fee plus an \$84.00 seasonal fee that is applied to the site if no Idle charges are assessed during that time.</li> <li>If eligible, this is used for sites requesting to go from active to IDLE/Rate Minimum billing. FortisAlberta verifies necessary requirements for this option.</li> </ul>
0006	Vacant Premises	<p>1301 or 1302 needs to be placed within the "Message to WSP" field on the DER transaction.</p> <ul style="list-style-type: none"> <li><b>1301</b> – Request for premise to be "tagged" for customer to contact Retailer within ten (10) business days. A DEF will be sent to the Retailer if the service is tagged on a DER 0006/1301. <i>Note: If FortisAlberta's PLT verifies service is vacant or not in use, FortisAlberta may disconnect the service and a DEC will be sent to the Retailer as verification. FortisAlberta reserves the right to disconnect on first request for vacant premise.</i></li> <li><b>1302</b> – Request for premise to be disconnected for no occupant information. <i>Note: Please ensure customer has received ten (10) business days from the DER 0006/1301 date to contact their Retailer prior to requesting a DER 0006/1302.</i></li> </ul>



#### 4. What is some common failure DER reason codes and an example of each?

Failure notifications are sent back to the Retailer within thirty (30) minutes of the request being reviewed by the system of record or the order being cancelled by FortisAlberta. For a list of all failure reason codes, please refer to the AUC Rule 021.

REASON CODE:	DESCRIPTION:	ANSWER:
0005	Invalid Retailer ID for site	<ul style="list-style-type: none"> <li>Site ID belongs to another Retailer other than the Retailer requesting the DER.</li> <li>If the site has not been enrolled successfully by any Retailer.</li> </ul>
1200	Already De-Energized	<ul style="list-style-type: none"> <li>Site was already de-energized or salvaged as per Retailer request.</li> </ul>
0013	Invalid site ID	<ul style="list-style-type: none"> <li>Site ID belongs to a different WSP.</li> <li>Site ID is incorrect.</li> </ul>
1222	Customer safety/Critical impact to customer	<ul style="list-style-type: none"> <li>Site cannot be de-energized as there is a "critical to have power" flag on site.</li> </ul>
0027	Other	<ul style="list-style-type: none"> <li>The failure reason cannot be classified by any of the reason codes available. See question 5 below.</li> </ul>

#### 5. If a DEF reason is undefined or unclear, how do I obtain a more detailed explanation?

If the Retailer requires more information regarding a DEF, including reason code "0027 – Other", please contact the Retail Support Team at (403) 514-4990 or via e-mail at [RetailSupport@FortisAlberta.com](mailto:RetailSupport@FortisAlberta.com).

#### 6. How does FortisAlberta update a DER with Customer/PLT appointment information?

FortisAlberta's field personnel can only view the 'contact name' and 'contact phone number' provided in the DER request, and as a result, the comments and appointment transactions are not entered on the generated service orders. FortisAlberta appreciates that some of our customers require a follow up call from field personnel and cannot guarantee appointments for service disconnections. Retailers whose customers require a call from the field can e-mail the Retail Support Team at [RetailSupport@FortisAlberta.com](mailto:RetailSupport@FortisAlberta.com) immediately after submitting the DER with URGENT: DER "Message to WSP" in the subject line. FortisAlberta will enter a specific comment or appointment time on the DER for the PLT. The e-mail request must include the following details:

- Site ID
- Customer name and phone number
- Location (legal land description or civic address)
- Request (include short explanation of DER reason. For example: moving trailer, remove meter and roll back lines etc.)
- Date Required (required date must be within three (3) business days of the DER submission)

#### 7. What is the process for a Retailer to revoke a DER?

Retailers can issue an RDR transaction after confirming neither a DEC nor DEF was received from FortisAlberta. Please note that as per the AUC Rule 021, the RDR transaction is a request and does

not include a performance or time certainty. The WSP may not be capable of recalling or canceling the de-energize request for the site.

**8. When a DER is requested for residential (rate 11) service, when do Distribution and Transmission (D&T) charges cease to be billed to the Retailer?**

REASON CODE:	DESCRIPTION:	EXAMPLE:
0001	Customer Request De-Energize	<ul style="list-style-type: none"> <li>When service is disconnected the Distribution and Transmission (D&amp;T) charges will cease to be charged to the Retailer.</li> </ul>
0002	Cut Off for Non-Payment	<ul style="list-style-type: none"> <li>When service is disconnected for Non-Payment, D&amp;T charges will continue to be charged to the Retailer until the meter is removed.</li> </ul>
0003	Premise Demolished	<ul style="list-style-type: none"> <li>When service is disconnected, D&amp;T charges will cease to be charged to the Retailer.</li> </ul>
0004	Safety Shut Off	<ul style="list-style-type: none"> <li>When service is disconnected D&amp;T charges will cease to be charged to the Retailer.</li> </ul>
0005	Seasonal Shut Off	<ul style="list-style-type: none"> <li>When service is disconnected, D&amp;T charges will cease to be charged to the Retailer.</li> </ul>
0006	Vacant Premises	<p>1301 or 1302 needs to be placed within the "Message to WSP" field on the DER transaction.</p> <ul style="list-style-type: none"> <li><b>1301</b> - When service is tagged, D&amp;T charges will continue to be charged to the Retailer. If the service is disconnected, D&amp;T charges will cease to be charged to the Retailer.</li> <li><b>1302</b> – When service is disconnected D&amp;T charges will cease to be charged to the Retailer.</li> </ul>

**Note:** All other rates will be reviewed manually by FortisAlberta to verify the appropriate action for each request as per the rate class. We will review the contract obligations, review if assets exist at the site and identify if the site should be billed IDLE charges or be salvaged.

**9. How does a Retailer handle emergencies; such as a fire?**

Please e-mail [RetailSupport@FortisAlberta.com](mailto:RetailSupport@FortisAlberta.com) after confirming the date of the fire and the energize status of the customers service. FortisAlberta will investigate by issuing a service order to have a PLT physically visit the site. Once completed, we will follow up with the Retailer to request the necessary transactions if required (such as safety shut off – DER 0004 or Premise Demolished - DER 0003) to be issued.

**10. What reason code does a Retailer use to request a site status change from active to IDLE/Rate Minimum billing?**

FortisAlberta will accept reason code 0001 – Customer Request to De-energize to initiate an active to IDLE/Rate Minimum request. FortisAlberta's Site Management department reviews and follows up with the customer to confirm the IDLE/Rate Minimum status. Please type comments, "Active to IDLE/Rate Minimum" in the 'Message to WSP' field, to better assist FortisAlberta's accurate execution of the request.

**11. How is the Retailer notified when a site status changes to IDLE/Rate Minimum?**

The Retailer is notified that a service is IDLE/Rate Minimum with an SMC transaction sent via VLTrader. The SMC identifies that the service went from an 'energized' status to a 'de-energized' status only. The second notification is sent via TBF that shows the service is in fact IDLE/Rate Minimum. The TBF identifies monthly service charges for IDLE/Rate Minimum billing. The third notification that the service is IDLE/Rate Minimum is in the DEC transaction confirming the DER completion.

**12. What is a salvaged service?**

The definition of a salvage is the permanent removal of electrical infrastructure such as meter, transformer, wires and poles at a specific site. There are cases however where a shared transformer is utilized for other active customers and we are then not able to physically remove all the facilities. We will however cease billing for the specified Site ID to be salvaged.

**13. What is the process for a salvage request?**

The salvage process requires that the owner signs a salvage letter authorizing their consent to permit the electrical facilities be completely removed. Costs will incur if in turn, the customer chooses to have electrical facilities brought back to their property.

***Note:** FortisAlberta Site Management Department verifies the necessary requirements for this option by contacting the customer to fully discuss the de-energize process.*

**14. What reason code does a Retailer use to request a site be salvaged?**

Please use Reason Code "0003" and type your 'Salvage' comments in the 'Message to WSP' field. FortisAlberta will ensure the correct transaction is accurately processed and executed.

**15. What process should Retailers follow when requesting a salvage for a de-energized site?**

The Retailer may create a RITS ticket to request the salvage if the site is already de-energized. The RITS ticket should include a contact name, number and mailing address for the customer requesting the salvage. The RITS ticket is delegated to FortisAlberta's Site Management department for review and action. Site Management follows the salvage process as outlined above and creates an internal request to have a sketch of the site created to ensure that the salvage is completed safely, and our records are updated accurately.

**16. How long does the salvage process take?**

The length of the salvage process is determined by the work involved and the responsiveness of the customer, as a signed salvage letter is required prior to salvage. Once the Site Management Coordinator has received the signed salvage letter, they initiate the salvage request. The 'Salvage Service Order' is typically completed within the three (3) business day SLA and the PLT will advise

Site Management when the site has been salvaged. Upon receipt of this notification, the Site Management Coordinator will render the Site ID as salvaged and produce the SMC and Notify Old Retailer (SRO) transaction for the Retailer.

**17. What happens if Site Management is not able to contact the customer to confirm the Salvage request?**

The designated process is as follows:

- Site Management will contact the customer three (3) times within the first two (2) weeks of the RITS receipt.
- The first copy of the salvage letter is sent to the customer. If the customer does not respond within the first 2 weeks of the request, a final phone call will be made to the customer.
- If there is still no response from the customer, the RITS will be closed and the site will remain on IDLE/Rate Minimum until the customer contacts the Retailer or FortisAlberta again.
- The Retailer will then be sent the coordinating transactions.

**18. What is the process regarding seasonal disconnects on residential (Rate 11) services?**

FortisAlberta completes seasonal disconnects on residential (Rate 11) services only. A PLT will visit the site to disconnect and may remove the meter with a DER 0005 (Seasonal disconnect) request from the customer's Retailer. The customer must contact their Retailer to initiate a reconnection for the site. The Retailer will send FortisAlberta an ENR request to install a meter at the service. Upon receipt of the request a PLT will be dispatched within three (3) business days to install a meter.

FortisAlberta will not apply distribution tariff during the months that the site was disconnected but will charge a reconnection fee of **\$120.00** plus an additional **\$84.00** fee (excluding GST) as the service is reconnected after the customer requested disconnect and no IDLE/Rate Minimum charges were assessed. A seasonal disconnect will ensure that the customer has no consumption, or estimated consumption applied to this site during the disconnect period.

**19. On what other rates are seasonal disconnects applied?**

FortisAlberta will continue to bill IDLE/Rate Minimum charges for all rates, excluding Rate 11, as part of the seasonal disconnect policy. The Retailer will continue to receive TBFs and appropriate AUC Rule 021 transactions.

**20. Will there be a reconnection fee for a service that was disconnected with reason code DER 0001 (Customer Request) and is then reconnected using the same UCI as the disconnect request?**

There is a reconnection fee of **\$120.00** plus an additional **\$84.00** fee (excluding GST) if the service is reconnected after a DER 0001 – Customer Request disconnect should no IDLE/Rate Minimum charges be applied during the disconnect period.

**21. How does a customer or Retailer request a temporary disconnect?**

Please inform the customer to call FortisAlberta's Contact Center at 310-WIRE (9473) for temporary disconnects that will be less than five (5) days. We can issue a service order to have a PLT complete

the temporary disconnect within three (3) business days. Currently, there is not a DER reason code for this type of DER outlined in the AUC Rule 021.

Please submit a DER – 0001 if the service will be disconnected for longer than five (5) days. FortisAlberta will disconnect the service within three (3) business days.

**22. What should a Retailer do when a customer reports a power outage?**

If the most recent SMC indicates the service is energized and the Retailer has not issued a DER, please refer the customer to 310-WIRE (9473) or 1-855-333-WIRE (9473) to report the power outage.

**23. How does a Retailer report a yard light that needs to be repaired?**

Please advise the customer to call FortisAlberta's Contact Center at 310-WIRE (9473) or at 1-855-333-WIRE (9473) to have a PLT dispatched to repair the yard light.

**Note:** *Ensure that the customer is being billed for a yard light, as FortisAlberta will only provide maintenance repairs to FortisAlberta owned yard lights.*

**24. Can the size of breaker be changed on a FortisAlberta Farm service?**

A farm service breaker may be upgraded or downgraded depending on the customers' requirements. A customer may request an upgrade of service to accommodate an anticipated load increase. A customer's load may increase due to new workshop/barn, hot tub, air conditioning unit, or grain dryer. Alternately, a customer may request a downgrade of service to reduce D&T charges as a result of changes to the farm operation.

If a customer requests to either upgrade or downgrade a breaker, advise the customer to call the FortisAlberta Contact Center at 310-WIRE (9473) or at 1-855-333-WIRE (9473).

**25. How many times may a customer request to have their breakers either upgraded or downgraded?**

A customer may request their breaker be upgraded more than once per year. Prior to processing a breaker upgrade request the FortisAlberta Customer Care Centre Representative will discuss the customer's new load requirements. Once reviewed, a request for upgrade will be created and processed by FortisAlberta to determine the size of the increase necessary to meet these requirements.

A customer may request to downgrade a breaker by one-amp size, once a year per the FortisAlberta Terms & Conditions. For example, if a customer has a 10-kVA breaker, the customer may downgrade to 7.5 kVA breaker in the first year and subsequently request a downgrade to a 5-kVA breaker the following year.

**Note:** *5 kVA breakers are the smallest breaker size available for farm customers.*

**26. Are all FortisAlberta Farm services billed according to breaker size?**

Most farm services are billed according to breaker size. Larger farms operation with higher load requirement may be billed according to demand. A demand metered service allows the customer to be billed on the greater of the demand shown on the meter or the minimum of 10 kVA as applied by the Rate.

**27. What is FortisAlberta's process to manage the amendment to the Distribution Tariff Regulation also known as the Winter Disconnect Policy?**

<b>FORTISALBERTA'S DISCONNECT POLICY BETWEEN OCTOBER 15 TO APRIL 15</b>				
<b>SERVICE TYPE</b>	<b>DISCONNECT FOR NON-PAYMENT (0002)</b>		<b>DISCONNECT FOR VACANT SITE (0006)</b>	
	<b>INSTALL A LIMITER</b>	<b>FULLY DISCONNECT</b>	<b>INSTALL A LIMITER</b>	<b>FULLY DISCONNECT</b>
<b>RESIDENTIAL</b>	Yes	No	Yes	No
<b>CENTRALLY METERED APARTMENTS/CONDOS</b>	Yes *If remote disconnect meters are available	No	Yes *If remote disconnect meters are available	No
<b>FARM</b>	No	No	No	No
<b>COMMERCIAL</b>	No	Yes	No	Yes
Please Note: (A) any services with a critical to have power flag within the UCI will not be disconnected or have a limiter installed. (B) this policy also applies between April 15 and October 15, or when the temperature is forecasted to be below zero (0) degrees Celsius in the 24-hour period immediately following the proposed disconnection.				

- FortisAlberta can limit centrally metered apartments or condos which have remote disconnect meters installed for their individual unit, as these limiters do not require a manual reset. When a customer exceeds the load limit on these meters, the limiter will trip the meter off and will reset itself after 15 minutes.
- We will **NOT** limit any sites where the customers do not have access to limiter.
- We will **NOT** limit any farm sites. The reason for this is in most cases the limiter would not hold due to the load on a site.

\*For further details on the FortisAlberta's Winter Disconnect Policy, please refer to Appendix A.

**28. Can a Retailer issue a disconnect order during the time period above?**

As a Wire Owner (WO), FortisAlberta reserves the right to install a device to limit or reduce the amount of electric energy provided to the customer.

**Note:** there are exceptions to this offer, see question number 32 below.

**29. Have there been amendments to the Winter Disconnect Policy?**

A provision was added to the Distribution Tariff Regulation in January 2004 to include the following:  
 "...relating to the disconnection of a customer for nonpayment of a bill in accordance with the following:"

- The Wire owner must not fully disconnect the customer at any time during the period from October 15 to April 15 or,
- At any other time when the temperature is forecast to be below 0 degrees Celsius in the 24-hour period immediately following the proposed disconnection.



**30. What rate classes are affected by the Winter Disconnect Policy?**

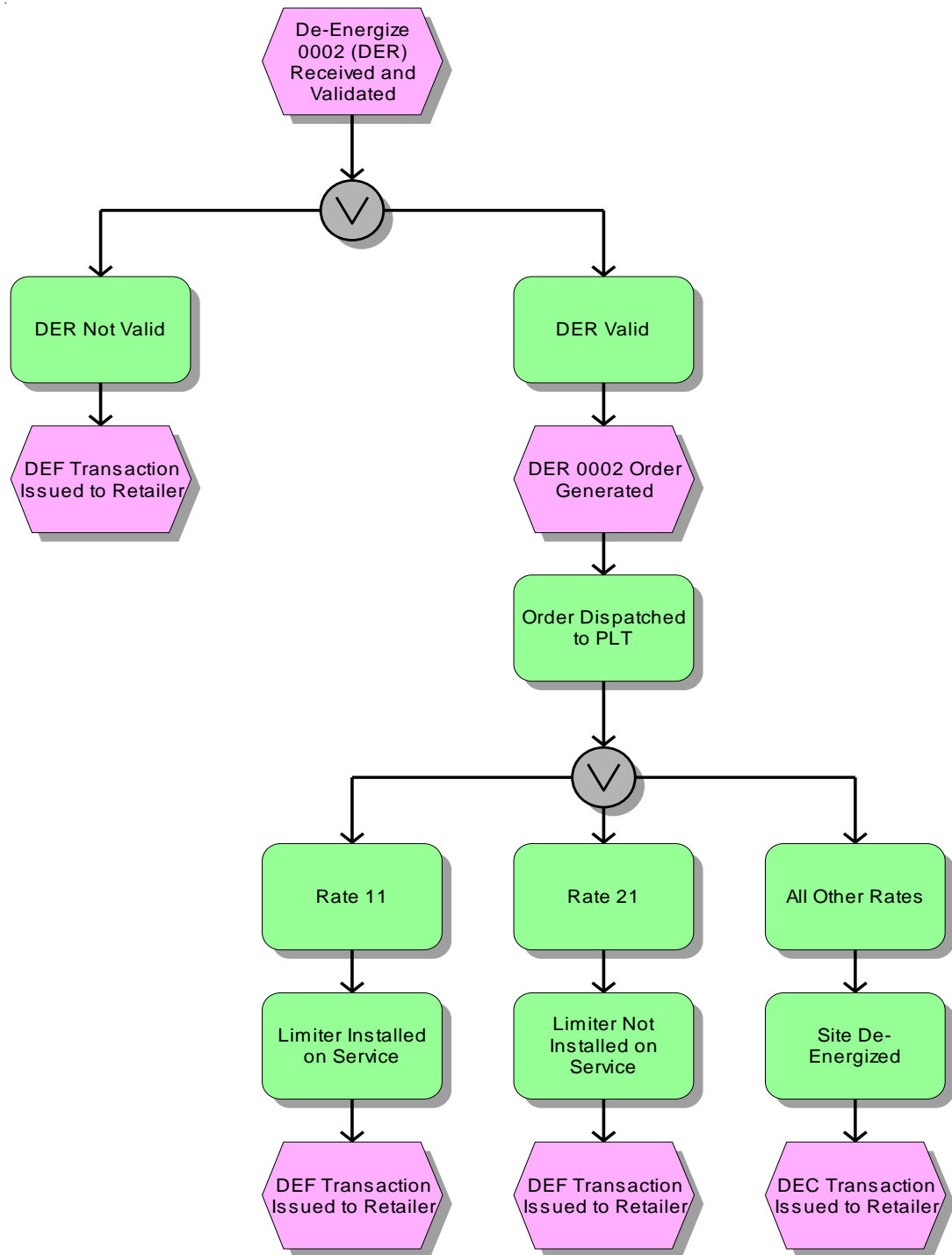
The Regulation applies to residential and farm rate classification customers as defined in FortisAlberta's Distribution Tariff.

**31. What would FortisAlberta's response be in the following scenarios during the Winter Disconnect Policy?**

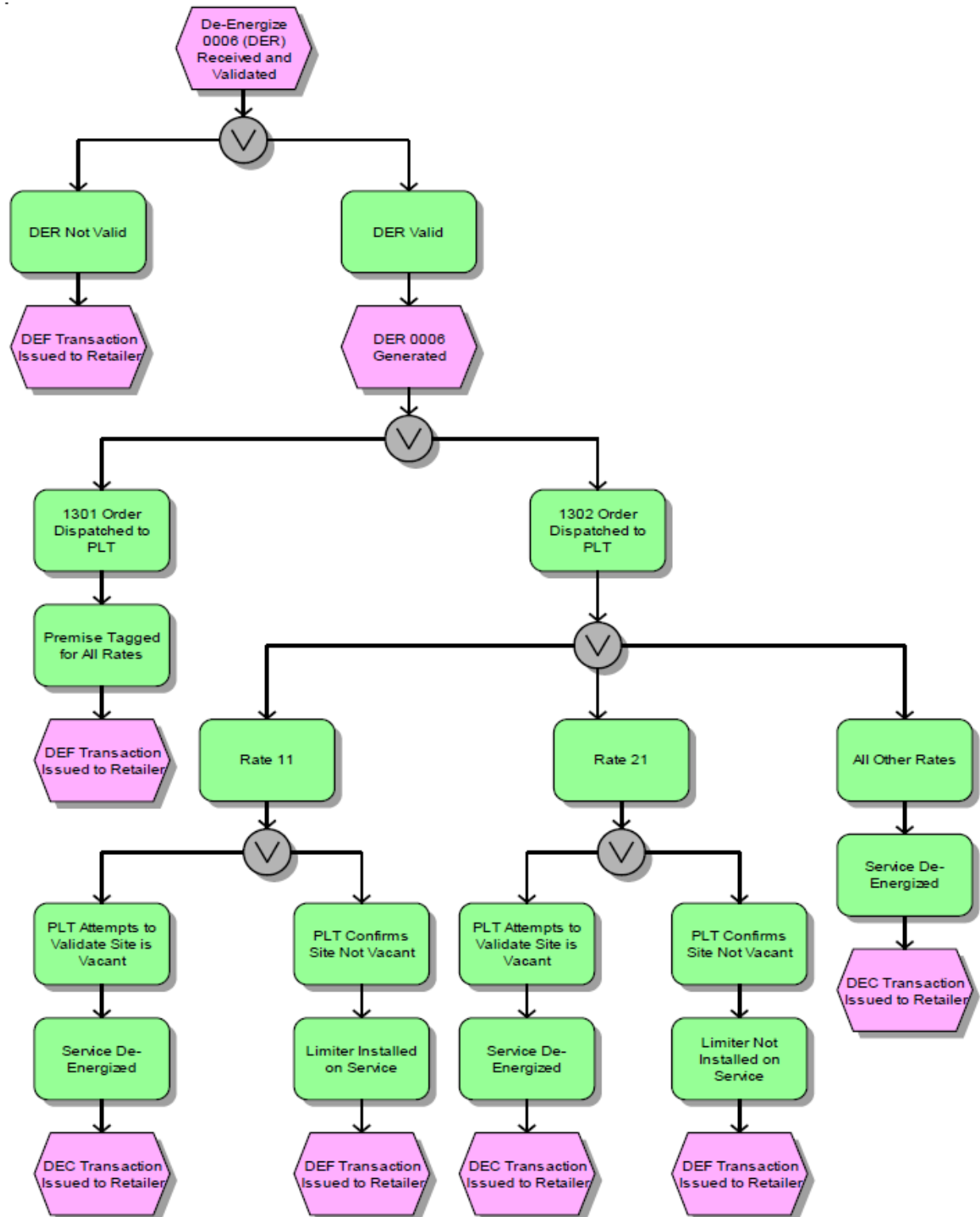
SCENARIO:	RESULTS:
<b>RETAILER ISSUES DER 0002 (CUT OFF FOR NON-PAYMENT) FOR MOST RATE 11 SERVICE TYPES.</b>	<ul style="list-style-type: none"> <li>• PLT installs a limiter. <ul style="list-style-type: none"> <li>○ A DEF – 1224 (load limiter installed) is returned to Retailer.</li> </ul> </li> </ul>
<b>RETAILER ISSUES DER 0006 (VACANT PREMISE) - 1302 (VACANT PREMISE, SECOND REQUEST) FOR MOST RATE 11 SERVICE TYPES.</b>	<ul style="list-style-type: none"> <li>• FortisAlberta will install a limiter if site occupancy is apparent. <ul style="list-style-type: none"> <li>○ A DEF – 1224 is returned to Retailer.</li> </ul> </li> <li>• At the request of a Retailer to disconnect the service, FortisAlberta will use good judgment ensuring the site is vacant prior to fully disconnecting. <ul style="list-style-type: none"> <li>○ A DEC is returned to Retailer in this scenario.</li> </ul> </li> </ul>
<b>RETAILER ISSUES A DER 0002 – 1402 (REMOVE LIMITER) FOR RATE 11 SERVICE TYPES DURING THE WINTER DISCONNECT POLICY.</b>	<ul style="list-style-type: none"> <li>• FortisAlberta's system will automatically issue a DEF – 1323 (Seasonal Disconnect Policy in place) to the Retailer.</li> </ul>
<b>RETAILER ISSUES A DER 0002 (CUT OFF FOR NON-PAYMENT) FOR RATE 11 SERVICE TYPES, HOWEVER THERE ARE NO LIMITERS CURRENTLY AVAILABLE.</b>	<ul style="list-style-type: none"> <li>• A DEF will be issued to Retailer</li> <li>• Retailer may issue another DER 0002 five (5) days after receipt of DEF.</li> </ul>
<b>RETAILER ISSUES A DER 0002 (CUT OFF FOR NON-PAYMENT) FOR RATE 21 SERVICE TYPES.</b>	<ul style="list-style-type: none"> <li>• Retailer should not send a DER 0002 for Rate 21 service types during winter policy.</li> <li>• The system will issue a DEF – 0027 to Retailer with the failure description comment "Winter Disconnect Policy in place, site will not be disconnected".</li> </ul>
<b>RETAILER ISSUES A DER 0002 (CUT OFF FOR NON-PAYMENT) OR 0006 – 1302 (VACANT PREMISE, SECOND REQUEST) FOR COMMERCIAL SERVICE TYPES.</b>	<ul style="list-style-type: none"> <li>• Using discretion<sup>1</sup>, FortisAlberta will fully disconnect the service.</li> </ul>

<sup>1</sup> FortisAlberta discretion as described within FortisAlberta's Customer/Retailer Terms and Conditions of Distribution Tariff

32. What path does a DER 0002 (Cut Off for Non-Payment) and 0006 (Vacant Premise, second request) take during the Winter Disconnect Policy?



DEF 1224



DEF 1224

**33. How does a Retailer determine if a service has limited power?**

Within field sequence 6 of the SMC transaction, "Type of metering", (L) will show when a limiter has been installed.

**34. What is the process for Retailers to follow when enrolling customers with limited power?**

Upon confirmation with the customer that they require full power restored to the service, the Retailer shall issue an ENR transaction. The SMC transaction will show the Retailer that the site is limited.

**35. Will there be a reconnection fee for restoring full power to a limited service?**

FortisAlberta charges a reconnection fee based on our Fee Schedule in FortisAlberta's Terms and Conditions.

**36. How will a Priority 1 be treated if the service has had a limiter installed?**

All ENRs are treated as the priority in which they were issued.

**37. How can I upgrade a Priority 2 to a Priority 1 with a limited site?**

DURING BUSINESS HOURS: MONDAY TO FRIDAY 7:30 AM – 4:00 PM:	OUTSIDE REGULAR BUSINESS HOURS:
<p>The Retailer's Enrollment Team is to contact the FortisAlberta Retail Support Team (403) 514-4990 and send an e-mail to <a href="mailto:RetailSupport@FortisAlberta.com">RetailSupport@FortisAlberta.com</a>. The e-mail should include the Site ID, reason for the escalation, customer name and the Supervisor's name authorizing that the Retailer of Record and/or the customer will accept the charges.</p> <p><b>Note:</b> The reason for the upgrade must be one of the Priority 1 Reasons; such as Retailer error or safety concerns.</p>	<p>The Retailer is to contact 310-WIRE (9473) and send an e-mail to <a href="mailto:RetailSupport@FortisAlberta.com">RetailSupport@FortisAlberta.com</a> and an e-mail to the 310-WIRE (9473) Customer Care Centre Representative prior to any action being taken. The e-mail must include the Site ID, reason for the Priority change, customer name and the Supervisor's name authorizing that the Retailer of Record and/or the customer will accept the charges.</p> <p><b>Note:</b> The reason for the upgrade must be one of the Priority 1 Reasons; such as Retailer error or safety concerns.</p>

**38. How can a Regulated Rate Option Provider (RRO) request to remove a limiter when the Winter Disconnect policy expires?**

FortisAlberta accepts two (2) DER transactions from an RRP to remove the limiter and fully disconnect for reasons such as vacant premise and non-payment. To full disconnect a service outside of Winter Rules, please include as the first four (4) characters in the "Message to the WSP" field either:

- DER 0002 – 1402: for a service that has been disconnected for non-payment.
- DER 0006 – 1402: for a service that has been disconnected for vacant premise.

## De-Select Request (DSR)

### 1. What is a De-Select Request (DSR)?

The DSR transaction enables a Retailer to notify a WSP that they will no longer provide electricity services for the site.

### 2. What is the definition of “Default Supplier”?

Defined in the FortisAlberta Retailer Terms and Conditions as a specific Retailer appointed as the Default Supplier for a Wire Owner under a regulated rate tariff. Also known as “SOLR” (Supplier of Last Resort) or an “RRP” (Regulated Rate Provider) or an “RRO” (Regulated Rate Option).

### 3. How many Default Suppliers are there in FortisAlberta’s service area?

There are currently eight (8) Default Suppliers partnering with FortisAlberta. They are:

- EPCOR Energy Alberta Inc.
- Ermineskin Rural Electrification Association Limited.
- Lakeland Rural Electrification Association Limited.
- Mayerthorpe Rural Electrification Association Limited.
- Niton Rural Electrification Association Limited.
- Peigan Utility Corp.
- Blue Mountain Power Co-op.
- Duffield Rural Electrification Association Limited.

### 4. What are the responsibilities of the Default Supplier?

The Default Supplier must provide retail electricity services to a customer that is not an eligible if the customer is unable to continue to purchase retail electricity service from the customer's Retailer of Record.

### 5. What are the responsibilities of FortisAlberta as the Wire Service Provider (WSP)?

FortisAlberta’s responsibility when aware that an event described as above has occurred, FortisAlberta must notify the customer (a) of the name of the Default Supplier that will provide retail electricity services to the customer, and (b) of the Terms and Conditions of service of the Default Supplier.

### 6. How does FortisAlberta meet these responsibilities?

To meet our responsibilities, FortisAlberta contacts the customer on sites where a DSR 0002 (Retailer dropped site) has been received using the information provided in the most recent UCI. The customer is contacted the following business day via automated phone call.

### 7. What is the complete DSR process?

The DSR process begins when a Retailer issues a DSR transaction. This transaction triggers FortisAlberta to send a “DSR like” transaction to the Default Supplier. Within three (3) business days, FortisAlberta will provide the Default Supplier with customer information for the site in question. Currently, FortisAlberta also issues a De-Select Notification (DSN) to the Retailer dropping the site as confirmation.

The Default Supplier will issue an SRR and UCI transaction on fifth (5<sup>th</sup>) calendar day or the date specified within the Requested Date Field of the DSR transaction.

If the site is not enrolled by an alternative Retailer on the 5<sup>th</sup> calendar day or prior to the Requested Date of the DSR - the Default Supplier will receive a successful Select Retailer Notification (SRN) transaction. If the site is enrolled by another Retailer during the specified time period, the Default Supplier will receive a failed SRN with a reason code 0017 – “Switch has already been processed for this site” and no further action is required by the Default Supplier.

Should FortisAlberta not receive an SRR and UCI as per the above DSR process, a report will be run on the following business day. This report will identify the Site ID's that were not enrolled as per the DSR process and notification is sent to the Supplier of Last Resort.

#### **8. How does a competitive Retailer initiate the DSR process?**

The competitive Retailer must first submit a DSR transaction, which should be coded as follows:

- **0001** – Customer Move Out
- **0002** – Retailer Drop (Contract End or Non-Payment)
- **0003** – Erroneous Enrollment
- **0004** – Abandoned Oil & Gas

The WSP will in turn send the Retailer a De-Select Notification (DSN) advising if the DSR transaction was successful.

#### **9. What is an erroneous enrollment?**

Typically, an erroneous enrollment is identified by the Retailer who enrolls the Site ID to a customer in error. When this occurs, the Retailer should issue a DSR 0003 transaction. This process is defined in the AUC Rule 021.

#### **10. What should a Retailer do when a DSR transaction was issued in error?**

FortisAlberta will accept a Revoke De-Select Request (RDS) transaction from the Retailer that issued the confirmed DSR transaction only prior to another Retailer enrolling the site. An outbound Revoke De-select Notification (RDN) indicating the RDS was successful will be issued to the Retailer. A copy of the RDN transaction will also be issued to the Default Supplier to prevent them from enrolling the site on the date indicated in the original DSR transaction they received.



## Load Settlement

### 1. What is the process for Retailers when VLTrader transactions are issued in error?

Depending on the AUC Rule 021 transaction issued in error:

AUC RULE 021 TRANSACTION	ACTION TO BE TAKEN:
<b>DER (DE-ENERGIZE REQUEST)</b>	<ul style="list-style-type: none"> <li>Retailer must issue an RDR (Revoke De-energize Request)               <ul style="list-style-type: none"> <li>If a DEC is received, the Retailer must re-energize the service as required.</li> </ul> </li> </ul>
<b>DSR (DE-SELECT REQUEST)</b>	<ul style="list-style-type: none"> <li>Retailer must issue an RDS (Revoke De-select Request)               <ul style="list-style-type: none"> <li>If an SRO is received, the Retailer must re-enroll the service as required.</li> </ul> </li> </ul>
<b>ENR (ENERGIZE REQUEST)</b>	<ul style="list-style-type: none"> <li>The Retailer must send an e-mail as soon as the error transaction is identified.</li> <li>E-mail the Retail Support Team at <a href="mailto:RetailSupport@FortisAlberta.com">RetailSupport@FortisAlberta.com</a>. In the e-mail, ensure the Site ID and customer name is identified. The Retail Support Team will manually fail the ENR order, resulting in an ENF – “0027” being issued to the Retailer, if not already energized.               <ul style="list-style-type: none"> <li>If an ENC is received, the Retailer must de-energize the service as required.</li> </ul> </li> </ul>
<b>ROR (OFF-CYCLE READ REQUEST)</b>	<ul style="list-style-type: none"> <li>The Retailer must send an e-mail to <a href="mailto:RetailSupport@FortisAlberta.com">RetailSupport@FortisAlberta.com</a> informing the Retail Support Team of the Site ID and ROR file name issued in error. The Retail Support Team will manually fail the ROR order.</li> </ul>
<b>SRR (SELECT RETAILER REQUEST)</b>	<ul style="list-style-type: none"> <li>As this would fall within the guidelines of an erroneous enrollment defined by the AUC Rule 021, the Retailer shall issue a DSR reason code 0003 upon receipt of the SRN.</li> </ul>
<b>UCI (UPDATE CUSTOMER INFORMATION)</b>	<ul style="list-style-type: none"> <li>The Retailer must send a corrected UCI transaction through VLTrader the following day.</li> </ul>

### 2. How does a Retailer rectify an erroneous VLTrader transaction?

Please e-mail [RetailSupport@FortisAlberta.com](mailto:RetailSupport@FortisAlberta.com) with the Site ID, transaction file name, reason why the file was sent in error and confirm if the file will be resent and the new file name if applicable.

### 3. Will Retailers be able to request corrections to final settled data using the Post Final Adjustment Mechanism?

AUC Rule 021 mandates Load Settlement Agents (LSAs) to identify changes to data affecting periods already final settled. In the instances where the LSA did not have sufficient data to identify a settlement error amounting to ‘+’ or ‘-’ 100 kWh or greater, after a waiting period of one month, Retailers are able to submit a PFAM claim using the established procedures prior to AUC Rule 021.

#### 4. What is a Site Characteristic Adjustment (SCA) transaction?

An SCA transaction is unique to FortisAlberta. It is used by self-operating REAs to communicate to FortisAlberta LSA for adding of new sites, correct energize or de-energize status, or correcting Retailer of Record assignment for their sites.

#### 5. Why is the SCA transaction not documented in the AUC Rule 021?

FortisAlberta and the self-operating REAs in FortisAlberta settlement zone use the SCA transaction to allow the transfer of required information from one self-operating REA WSP to LSA.

#### 6. How is an SCA submitted to FortisAlberta?

The SCA transaction is submitted to FortisAlberta using VLTrader.

#### 7. What fields are required fields in an SCA transaction?

Below is the SCA transaction field name and if the field is mandatory.

#	FIELD NAME	DATA TYPE / SIZE	MANDATORY
1	Transaction Abbreviation Site Characteristics	Char (3) 'SCA'	Mandatory
2	Transaction Date time	Char (14) YYYYMMDDHHMMSS	Mandatory
3	Wires ID	Number (4)	Mandatory
4	Settlement ID	Number (4)	Mandatory
5	Site ID	Char (13)	Mandatory
6	MDM ID	Number (4)	Mandatory
7	Wires Service Provider ID	Number (4)	Mandatory
8	Retailer identifier – Supplier Value	Varchar2 (10)	Mandatory
9	Site Creation Date/Time	Char (14) YYYYMMDDHHMMSS	See Note 1
10	Change Date/Time	Char (14) YYYYMMDDHHMMSS	See Note 1
11	Energize Date/Time	Char (14) YYYYMMDDHHMMSS	See Note 1
12	Site De-energize Date/Time	Char (14) YYYYMMDDHHMMSS	See Note 1
13	Settlement Zone ID	Number (4)	Mandatory
14	Site Type	Char (1)	Mandatory
15	Embedded Generation Flag	Char (1)	Mandatory for Add. Optional for Update.
16	Estimated Consumption "Seed Value"	Number (14,4)	Mandatory for Add. Optional for Update.
17	Initial kVA Estimate	Number (14,4)	Null
18	Weather Station	Varchar (20)	'ABC'
19	Profile Type	Varchar (20)	Mandatory
20	Profiling Class	Varchar (20)	Null
21	Loss Group Code	Varchar (10)	Mandatory
22	Unmetered Load Type Code	Varchar (10)	Null
23	Meter Feed Description	Varchar (40)	Null
24	Transaction Type	Char (1)	Mandatory. See Note 2
25	Transaction Status Code	Char (4)	Null

**Note 1:** Only one (1) of the four (4) date fields should be filled for each file.

**Note 2:** 'A' for Add, 'U' for Update

<i>CASE #:</i>	<i>DETAILS 1:</i>	<i>DETAILS 2:</i>
<b>1</b>	Site Creation	Site Creation Date
<b>2</b>	Energize / Re-energize	Energize Date
<b>3</b>	De-energize	De-energize Date
<b>4</b>	Other Change	Change Date

## Site ID Requests

### 1. How often is the Retail Site Catalogue updated?

The Retail Site Catalogue is updated daily (including weekends and holidays) by 4:00 AM.

### 2. Where can I find FortisAlberta's Site ID Catalogue?

The site catalogue is located at: <https://www.fortisalberta.com/for-business-industry/retailers> → **Retail Site Catalogue**

### 3. What is the process for requesting a new Site ID?

When the Retailer cannot confirm the correct Site ID in the Site Catalogue, the Retailer may fill out a Site ID Request Form and e-mail it to the Site ID Team at [SiteIDRequests@FortisAlberta.com](mailto:SiteIDRequests@FortisAlberta.com).

### 4. Where is the Site ID Request Form located?

The Site ID Request Form is currently available online at <https://www.fortisalberta.com/customer-service/documents-forms/get-connected/1> → **Site ID Form (XLS)**.

### 5. What information is required on the Site ID Request Form?

Information required includes:

- Date of the request.
- Retailer name and ID.
- Customer name or business name.
- Customer phone numbers (Home, Business, and Cell Numbers).
- Requested by (requester's name).
- Service nature or rate (e.g. Residential, Farm, Commercial).
- Type of service (New, Existing, or Additional service).
- Civic address:
  - Unit #
  - House #
  - Street name
  - Street suffix
  - Direction
  - City/Town/Village
  - Lot, Block, Plan
- Legal land description:
  - Quarter, Section, Township, Range, Meridian.
  - Lot, Block, Plan
  - Subdivision name
  - Service area

**Note:** Lot, Block and Plan have been added as required fields.

Optional fields that will assist with the Site ID request include:

- Is the service metered or unmetered?
- Meter # (to search for existing Site ID).
- Existing Site ID and/or Reference Number.
- Other details or comments can be filled out in the details section.

#### 6. What is the turnaround time for a Site ID Request Form?

The Retailer will receive a response within twenty-four (24) hours of receipt of the completed Site ID Request Form. There are scenarios when a Site ID may take longer than the standard twenty-four (24) hour timeline. In those instances, FortisAlberta will communicate the reasons for the delay and the expected time frame.

#### 7. What are some reasons a Site ID creation may exceed twenty-four (24) hours?

The Site ID Team may need to contact the customer or Municipality if the Site ID Request Form is missing address information such as the complete legal land description. To avoid delays, please ensure the address information supplied on the Site ID Request form is accurate and complete.

A Site ID creation exceeding twenty-four (24) hours may also occur if the Site ID request requires a FortisAlberta Quotation Analyst to contact the customer to provide a quote for new service.

#### 8. What Rate codes does the Site ID request form apply to?

The Site ID Request Form is only for Residential (Rate 11) services. The customer should contact our Contact Center at 310-WIRE (9473) for all other rates to request a quote for new service through our Customer Interaction group.

#### 9. What process does a Retailer follow when the end use customer received a quote for a new service, but does not have record of their new Site ID number?

The Site ID Request Form can be used if the customer has contacted FortisAlberta to request a quote for new service. To expedite the request, the customer's FortisAlberta reference number (referred as a CRM number) should be included on the Site ID Request Form. Upon receipt of the Site ID Request Form, the Site ID Team will follow up with the Quotation Analyst to find out the status of the quote and will then reply to the Retailer with details.

#### 10. What are FortisAlberta's Distribution Tariff Rates?

FORTISALBERTA RATE:	RATE DESCRIPTION:
RATE 11	Residential Service
RATE 21	FortisAlberta Farm Service
RATE 23	FortisAlberta Grain Drying Service
RATE 24	REA Farm Service
RATE 25	REA Large Farm Service
RATE 26	FortisAlberta Irrigation Service
RATE 29	REA Irrigation Service
RATE 31	Street Lighting Service (Investment Option)
RATE 33	Street Lighting Service (No Investment Option)
RATE 38	Yard Lighting Service
RATE 41	Small General Service
RATE 44	Oil & Gas (Capacity) Service (Closed)
RATE 45	Oil & Gas (Energy) Service
RATE 61	General Service
RATE 63	Large General Service
RATE 65	Transmission Connected Service
RATE 66	Opportunity Transmission

## Metering Information:

### 1. What is the definition of a ROR request?

A ROR is an off-cycle meter read outside of the periodic bill cycle. The ROR will be obtained through FortisAlberta's automated metering technology.

**Note:** *FortisAlberta will try to acquire actual reads at month end, in addition to the scheduled bill cycle for each site.*

### 2. What is the charge for a ROR request?

A service fee of \$36.00 (excluding GST) is applied to the Site ID and flowed through via the Tariff Bill File (TBF) if the ROR confirms the actual meter reading in question was accurate. We will *not* charge the Retailer if our meter read was incorrect.

### 3. How can a Retailer confirm an actual meter read for a site?

The Retailer can confirm by virtue of the DCM transaction.

### 4. Will FortisAlberta accept customer meter reads and from what customers?

FortisAlberta no longer requires customers to read their own meters for move in/out purposes, as our automated metering system will extract actual reads for this purpose.

### 5. What should Retailers discuss and investigate with customers prior to sending a ROR request?

- Review the customer's consumption history to identify any possible trends in high consumption during peak seasons.
- Question the customer on recent changes to their electric usage.
  - Has the customer installed a hot tub or been using additional electrical equipment?
  - Has the customer had guests recently staying at their home?
  - Does the customer use a space heater to regularly to heat rooms in their home?
- Review the customers billing history to identify any possible adjustments/billing errors.
- Determine the site's next scheduled read date and ask the customer if this scheduled read would provide a read soon enough to address their concern.
- Determine if the site has consistent actual meter reads that are in line with past consumption.
- Advise the customer of the charge.

### 6. What if the customer is not satisfied with the results of the ROR?

After the Retailer has done a complete consumption analysis, you can request FortisAlberta to do a site visit.

To initiate a FortisAlberta site visit, utilize our website and the following menu path:

<https://www.fortisalberta.com/for-business-industry/retailers> Retailer Inquiry Tracking System (RITS). Create a General Inquiry ticket requesting a PLT to visit the site. Please include the history and steps the Retailer has taken to verify the concern with the customer.

### 7. What if you not satisfied with FortisAlberta's PLT site visit?

The Retailer can offer to have a parallel meter installed. To initiate a parallel meter test for single phased, self-contained meters, which validates the meter on the site is reading within a +/-3% error

rate (which is the approved variance by Measurement Canada), the customer will contact our toll-free Customer Care Center at **310-WIRE (9473)** to request a parallel meter be installed.

Requirements to install a parallel meter include:

- There must be room at the meter base for the parallel meter to be installed alongside the existing meter.
- The service must be single-phase self-contained.
- Voltage compatibility.
- The service amperage is compatible with the test equipment.

**8. What if the service is larger than a small commercial service?**

We ask the customer to contact 310-WIRE (9473) to request that a site visit from a FortisAlberta PLT be completed. After the PLT has reviewed the service, the PLT may initiate another on-site meter test request with a FortisAlberta Meter Technician Specialist. The Meter Technician Specialist can perform similar functions that a parallel meter would validate.

**9. What process is used to install a parallel meter on a service?**

FortisAlberta removes the customer's original meter and installs a double meter socket with the parallel 'test' meter attached, in addition to the customer's original meter.

FortisAlberta obtains an actual meter read subsequent to the meter installation on both meters. The parallel meter is left on-site for up to five (5) business days. If the meter reads are within a +/- 3% error rate of each meter. If the parallel meter meets those guidelines, FortisAlberta is confident that the current meter is reading accurately.

**10. What is the next step if the customer is still not satisfied with the parallel meter test?**

FortisAlberta is obligated to inform the customer their right to dispute the meter and is informed that a deposit is required to have the meter tested by an Inspector from Measurement Canada. FortisAlberta will refer the matter to the areas Meter Services Technologist who will handle the issue.

**11. What is the charge to have a meter tested by the government?**

Customers will be charged \$50.00 for a residential meter and \$100.00 for a commercial demand meter. If the meter is not registering correctly, and the customer has been over-billed, the customer is returned the fee and the reimbursement of over billed kWh is reviewed by the Billing department. If the meter test confirms the meter has been under registering consumption the customer is returned the fee and will be billed the under registered kWh. If their meter is registering consumption correctly the fee will be retained by FortisAlberta to offset the costs of the meter test. Following the meter test, the fee is charged via the TBF as a Service Charge and billed to the Retailer.

**12. What is the process for notification of cumulative to an interval meter exchange?**

FortisAlberta will update Retailers of cumulative to interval meter exchanges using an SMC transaction through VLTrader.

**13. How can a customer receive consumption history for their site?**

A customer can request their site consumption history by completing the Permission to Release Electric Customer Load Data form located on the FortisAlberta website at [www.FortisAlberta.com](http://www.FortisAlberta.com)  
→ Retailers → Retailer Resources → Resources → Permission to Release Electric Customer Load Data.

**14. How much time will it take for FortisAlberta to prepare the consumption history?**

Metering requires up to three (3) business days to prepare the consumption history requested.

**15. What are the costs when the customer requests their consumption history?**

- Customer usage information requests less than or equal to twelve (12) months is provided to the customer at no cost.
- Customer usage information requests greater than twelve (12) months is \$25/hour for regular meters and \$50/hour for interval meters.

**16. How will a third party (non-registered Retailers) receive consumption history?**

The third party and the end use customer will complete the Permission to Release Electric Customer Load Data form. Once the form is submitted to FortisAlberta, FortisAlberta will confirm that the customer information from the form and our system of record match. FortisAlberta will then provide the consumption history in the manor requested by the customer.



## Automated Meters:

### 1. What is an Automated Meter?

An automated meter allows FortisAlberta to read meters remotely without having to physically visit and manually read meters.

### 2. How do Automated Meters work?

The meter records and transmits usage information to local data collection systems, either over the existing power lines or by using a radio frequency technology like a cellular phone. The data is sent every day to a computer system via a cellular modem connection.

### 3. What areas are complete with the new technology?

FortisAlberta's service territory is equipped with automated meters.

### 4. What happens if the automated meter does not transmit a read on the billing date?

- For Residential Rate 11 meters: If a read was collected for the day before the scheduled meter read, this read is brought into FortisAlberta's system of record and used as an actual read. Otherwise, if daily reads exist within six (6) days prior to the scheduled read date, the most recent read is brought into FortisAlberta's system of record and entered as an off cycle read. FortisAlberta then creates an estimate read for the period between the off cycle read, and the scheduled meter read date. If no reads exist within six (6) days prior to the scheduled read date, FortisAlberta creates an estimate for the full month since the last billed read.
- For Commercial meters (Demand): FortisAlberta will create an estimate read for the full month since the last billed read.

### 5. Can a customer presume that every meter read on an automated site was delivered by the Automated Metering system?

Yes, in most cases. However, there may be times where a manual meter reading is required on an automated meter. There may be cases where FortisAlberta must generate an estimated read for automated meter services due to various factors.

### 6. If a customer has an automated meter, why might they receive an estimated read?

Even though a customer has an automated meter installed, they may continue to receive estimated meter reads.

Some reasons a customer may continue to receive estimates meter readings are:

- Infrastructure at the substation has not been commissioned and is not able to transport automated metering data.
- In some cases, FortisAlberta may pre-deploy automated meter installations before the communication equipment needed to enable the automatic reads is complete.
- The automated meter is on site registering the customer's power, but the data is not being fed back to the substation yet.
- There was interference in the transmission of the meter read data. For example, a power outage.
- A line switching event causing the meter to be fed by a different substation.
- Short term technical problems.

## **Request Update to Customer Information (RUC):**

### **1. What is a RUC transaction requesting?**

As per the AUC Rule 021, a RUC may be sent by the WSP if the WSP suspects that the customer information for a specific site is not up to date. The RUC transaction is requesting the current Retailer of Record to send updated customer information in the UCI transaction.

### **2. How will the Retailer know what fields FortisAlberta suspects are incorrect?**

As per the AUC Rule 021, FortisAlberta will include the Incorrect Field number in the RUC transaction. FortisAlberta can send up to five (5) suspected incorrect fields in one (1) RUC request.

### **3. How many business days does a Retailer have until they are required to send the UCI transaction?**

As per the AUC Rule 021, the Retailer must respond with a UCI within five (5) business days of receiving the RUC transaction.

### **4. Why would FortisAlberta issue a RUC transaction to the current Retailer of Record?**

FortisAlberta will issue a RUC transaction if:

- The customer has advised FortisAlberta that we do not have the same information that was already provided to the customers current Retailer.
- We are unable to successfully contact a customer to advise them on a Planned Power Outage (PPO) in their area.
- Valid UCI in response to invalid UCI not received.

## **Regulated Rate Option (RRO) Regulation:**

### **1. What is the RRO Regulation?**

The RRO is a government approved rate that is available to residential, farm, irrigation and small commercial customers that consume less than 250,000 kWh/year. The new RRO regulates that the energy charge be set monthly based on short-term power purchases. The AUC approves how Regulated Retailers purchase energy for the RRO and the monthly RRO rates. Currently, 100% of the RRO is purchased the month ahead, therefore the RRO rate will change each month as the commodity price fluctuates.

### **2. What is the definition of an “eligible customer” under the RRO Regulation?**

An “eligible customer” means either a rate classification customer (a residential, farm or, irrigation customer) or any other customer; if the owner’s reasonable forecast of the customer’s annual consumption of electric energy at a site is less than 250 megawatt hours of electric energy at that site.

### **3. What process has FortisAlberta implemented to align the RRO Regulation to our business process?**

FortisAlberta has implemented the Tariff Billing Code (TBC) and is utilizing the protocol as specified by the current version of the TBC to send the TBF to all Retailers for both regulated and contract customers. The benefit to customers is that all regulated WSPs will be sending identical "bill ready" files in VLTrader.

## Micro-Generation Regulation:

### 1. How will a Retailer know if a micro-generator exists at a customer site?

Commissioned micro-generators will be identified in the FortisAlberta Site ID catalogue. Additionally, upon enrolment of a site with a micro-generator and for newly commissioned micro-generators, the Retailer will receive a notification transaction Micro-Generation Retailer Notification (GRN) that will identify the Site ID as a site with a micro-generator.

### 2. How will a Retailer know the amount of energy that was sent to the distribution grid by a micro-generation customer so that the credit can be calculated for the customer?

As FortisAlberta is the Meter Data Manager (MDM), we will send the kilowatt hour energy supplied to the distribution grid by the micro-generator using the Micro-Generation Cumulative Meter Consumption (GCM) and Micro-Generation Interval Meter Reading (GIM) transaction, for small and large micro-generation sites, respectively.

### 3. Will micro-generation metering data be available to the old and new Retailer at the time of a Retailer switch?

For small micro-generation sites, a GCM will be sent to the old and new Retailer at the time of the next meter read after the switch. As small micro-generators are not accounted for in the load settlement calculation, no Cumulative Switch Estimate (CSE) will be available. For large micro-generation sites, a GIM will be sent to the old Retailer for the day before the switch and to the new retailer for the effective day of the switch, like the Daily Interval Meter Readings to Retailers (DIM) transaction.

### 4. How would a Retailer notify FortisAlberta that a customer is de-commissioning their micro-generator?

The Retailer would use the [RITS General Inquiry](#) system to notify FortisAlberta of a micro-generator de-commissioning. After de-commissioning the micro-generator meter at the site, FortisAlberta will send a GRN transaction to the Retailer and the Alberta Electric System Operator (AESO) and will update the Site ID catalogue.

### 5. What is the process for obtaining historical micro-generation metering data?

The Retailer would use the RITS General Inquiry system to request historical micro-generation metering data.

## Rule 004 – Alberta Tariff Billing Code (TBC):

### 1. What is the TBC?

Effective July 1, 2005, Rule 004 (formerly known as *Directive 012 - The Alberta Tariff Billing Code*) was implemented. The TBC was and still is an **AUC** driven initiative based on the recommendations arising from the Retailer Information Management Committee (RIMC) report published November 2002.

The TBC was created to develop one (1) TBF format for communicating site-specific distribution tariff charges and usage information from WO to Retailers. The TBC also included performance requirements and metrics and monitoring of the performance metrics.

### 2. As a result of the TBC, did FortisAlberta change their Distribution Tariff invoice process?

As a result of the TBC, FortisAlberta commenced sending TBFs daily. FortisAlberta will aggregate TBFs into a Weekly Distribution Tariff invoice which is sent to Retailers every Tuesday on a weekly basis

### 3. What tools are available for Retailers to assist with identifying billing and meter reading schedule information?

A Retailer can align customer bill production according to the tariff bill publish date for a bill cycle which is reported in the Tariff Bill Calendar File (TCF). A Retailer can align a site's tariff bill cycle which is reported in the Site Cycle Catalogue File (SCF). The SCF and the TCF are available on FortisAlberta's website at [www.FortisAlberta.com](http://www.FortisAlberta.com) under Retailer → Retailer Resources → Site Cycle Catalogue (SCF) & Tariff Bill Calendar (TCF).

### 4. What information can be found in the TCF?

The TCF provides a common format for WSPs to disclose yearly tariff bill cycle schedules to Retailers. FortisAlberta must publish the TCF according to the file standards.

### 5. What information can be found in the SCF?

The SCF provides a common format for WSPs to disclose site and bill cycle data to a Retailer to enable the Retailer to cross reference sites to a WSPs bill cycle. FortisAlberta must publish the SCF according to the file standards.

### 6. When a Retailer opens the SCF, why is there an error message that the file was not loaded correctly?

Most browsers will automatically load .CSV files into excel when the link is selected. This process will also remove leading zeros (i.e. 0040 will appear as 40 or portion 02 will appear as 2).

To manually download a copy of the SCF: right click on the link and select 'Save Target As'. Save to your computer. Then open the SCF file in another application such as WordPad or Notepad.

### 7. When does FortisAlberta produce TBFs?

FortisAlberta will issue TBFs through VLTrader on the day that they are due, as per the TCF period.

## 8. When does FortisAlberta obtain actual reads and send TBFs on Irrigation services?

The official read schedule for irrigation services is as follows:

- May 31<sup>st</sup>
- July 31<sup>st</sup>
- September 30<sup>th</sup>
- October 31<sup>st</sup>

*Note - Irrigation services can bill up to 65 days.*

## 9. What happens to D&T charges during off peak irrigation seasons?

In the on-season (April 1<sup>st</sup> to October 31<sup>st</sup>), irrigation meters are read, and customers invoiced for the consumption and demand used during the billing periods. In the off-season (November 1<sup>st</sup> to March 31<sup>st</sup>), irrigation sites will receive a TBF for zero dollars unless the automated meter shows that the customer is using power. If consumption is used during the off-season, a TBF will be issued including the kWhs, however demand charges are not billed in these circumstances. Demand charges are billed in the on-season only. The bill schedule during the off-irrigation season is as follows:

- December 1<sup>st</sup> to 31<sup>st</sup> - the TBF will be issued on/around January 10<sup>th</sup>
- January 1<sup>st</sup> to 31<sup>st</sup> - the TBF will be issued on/around February 10<sup>th</sup>
- February 1<sup>st</sup> to 29<sup>th</sup> - the TBF will be issued on/around March 10<sup>th</sup>
- March 1<sup>st</sup> to 31<sup>st</sup> - the TBF will be issued on/around April 10<sup>th</sup>

## 10. Why is FortisAlberta charging a minimum charge even though the service is not connected and there is no consumption of energy?

Even though the service is not connected and has no energy consumption, there are still costs associated with the operation and maintenance of the Facilities that were built for the service. The minimum tariff Rate is also designed that over the period of the service life of the Facilities, FortisAlberta will recover its investment in those Facilities.

## 11. Will FortisAlberta be charging the Retailer retroactively for the period that these charges were not being billed?

FortisAlberta will not be implementing any charges retroactively. All charges will be for a go forward basis.

## 12. Will there be a set number of TBFs expected to be sent to each Retailer daily?

FortisAlberta issues TBFs by cycle so the number of TBFs sent each night will vary depending upon the timeframe the sites are being billed for and if the Retailer has any sites within the cycle being billed.

## 13. How does FortisAlberta create estimated consumption for TBFs?

There are three (3) potential methods of determining estimated consumption:

- If there is at least one (1) actual read earlier than 365 days before the estimation date, the system calculates Average Daily Usage (ADU) of the period between the closest actual read prior to that date and the closest actual read following that date. This ADU is then used to calculate the estimated usage in the current period based on the required number of days for the estimate.

- If FortisAlberta does not have sufficient history for the calculation outlined in bullet 1 above but has at least two (2) previous actual reads, the system calculates ADU based on the consumption between the last two (2) actual reads closest to the estimate date.
- If FortisAlberta does not have at least two (2) previous actual reads, the system calculates ADU based on seed values set by rate class.

**14. When I open the TCF, what does each of the columns represent?**

The TCF is excel based and has four (4) columns.

- The first section of numbers is the Wire Service Provided ID (0040).
- The second section of numbers is the Bill Cycle number (to find a bill cycle for a Site ID, you must open the SCF).
- The third section of numbers is the scheduled TBF Publish date, which is the date the TBF will be available within VLTrader.
- The fourth section of numbers is the Scheduled Read Date.

***Note:** FortisAlberta has five (5) business days from the Scheduled Read Date in the TCF to complete the reading.*

**15. How do service charges display within the TBF?**

Service charges are sent to Retailers with unique billing document numbers. Service charges are not included with D&T bill documents. All reversals for the new service charges created by FortisAlberta will be managed using the current process of reversing D&T documents. A Retailer will see a reversal document number in the TBF, which is identical to the current reversal process.

**16. What are the changes to the RITS process as a result of the TBC?**

The TBC implemented a Tariff Bill Dispute (TBD) transaction which enables a Retailer to dispute tariff billing information at the tariff bill period or one-time charge level. This transaction is utilized by a Retailer to inform a WSP of standard file content validation test failures. For example: A Retailer receives a Duplicate One-time Charge. The Retailer will submit a TBD with the four-digit Dispute Code of 7012 – Duplicate One-time Charge.

**17. How many TBD Dispute Codes are there?**

As per Rule 0004 – The Alberta Tariff Billing Code, there are twelve (12) four-digit TBF Dispute Codes available. A listing of the codes can be found within the TBC.

**18. What does FortisAlberta do when they receive a TBD?**

FortisAlberta responds to the Retailer by sending a Tariff Bill Dispute Notification (TDN) transaction advising if the TBD received is a valid or invalid dispute. If the transaction is valid, the site is corrected according to the cancel/rebill process and new information is sent out in the next TBF. If the TDN transaction is invalid, a TDN 'R' reject is issued to the Retailer.

**19. How does a Retailer know about the status of their TBD?**

The TDN transaction enables a WSP to inform a Retailer of the status and outcome of a TBD transaction.

**20. What are the functions of a TDN transaction?**

The functions of the TDN Transaction as per the TBC, consists of a two (2) Step process. The first step is the Acknowledgment or Rejection of the TBD. The second step is the completion or rejection

of the acknowledged TBDs.

For example:

Step 1 - Retailer will receive a TDN 'A' **acknowledging** receipt of the TBD transaction. If upon initial review, the TBD is determined to be invalid, the Retailer may immediately receive a TDN 'R' (reject) without having received a TDN 'A' (acknowledge).

Step 2a - Retailer will receive a TDN 'C' as notification that the necessary cancel/rebills to resolve the dispute have been **completed** and will be presented to the Retailer in a subsequent TBF.

Step 2b - Retailer will receive a TDN 'R' reject if FortisAlberta **rejects** the TBD submitted. Included in the TDN 'R' is a Reject Code as well as a Resolution Text field, which will provide the Retailer with a short explanation as to the TDN - reject reason.

## **21. How does a Retailer dispute a TDN “R”?**

The Retailer will send an e-mail to the SRM ([RetailAcctReps@FortisAlberta.com](mailto:RetailAcctReps@FortisAlberta.com)) which includes the TBF name and a detailed description for the dispute of the TDN (R)ject transaction. The SRM will investigate and reply to the Retailer with a detailed response to support the original TDN (R)ject transaction or the new TDN file name.



## **Rule 010 – Site-Specific Historic Usage Information:**

### **1. What is Rule 010?**

Effective June 1, 2008, the AUC implemented Rule 010 “Rules on Standards for Requesting and Exchanging Site-Specific Historic Usage Information for Retail Electricity and Natural Gas Markets”. Rule 010 outlines business processes and rules that govern the exchange of site-specific historic usage information between a Distributor and a Retailer within the Market. Retailers with a Representation and Warrant document (also known as Historical Consumption Request Agreement) will request historic usage information from FortisAlberta according to the transactions described in Rule 010 for up to a period of 425 calendar days from the date of request.

### **2. What are the Retailer Responsibilities for Rule 010?**

The Retailer’s responsibilities for Rule 010 are to:

- Obtain customers’ consent to request historical consumption information from FortisAlberta.
- Document customers’ consent in a consistent and verifiable format.
- Issue a Request for Usage (RFU) transaction, via VLTrader, to FortisAlberta requesting the historical consumption information.
- Review the Historic Usage File (HUF) transaction, via VLTrader, from FortisAlberta containing the historical consumption information.

### **3. What are FortisAlberta’s Responsibilities for Rule 010?**

FortisAlberta is responsible to:

- Review and validate the RFU transactions received from the Retailer, Gather the usage and demand information for the site in question with no more than 425 days of Historical Consumption.
- Issue a HUF transaction, via VLTrader, containing the historical consumption information to the Retailer.

### **4. As a Retailer, do I need an agreement to be complying for Rule 010?**

Rule 010 requires all Retailers to sign a Representation and Warrant document (also known as Historical Consumption Request Agreement). FortisAlberta relies on this document as proof that the Retailer has obtained customer consent each time a Historic Usage Information request is made.

### **5. What transaction does a Retailer issue to receive Historic Usage Information?**

The RFU transaction provides a mechanism for Retailers to request site-specific historic usage and demand information.

### **6. What information will a Retailer receive from FortisAlberta?**

A Retailer will receive a HUF in response to their RFU. The HUF provides site-level historical usage and demand information for a period not greater than 425 days. The HUF is sent in a CSV format through VLTrader.

### **7. What if the site has less than 425 days’ worth of Historical Consumption?**

If historical consumption is not available for a full period (425 days), FortisAlberta will provide the data that is available for the period in question.

8. What is the HUF Content and Record Type Descriptions in the CSV file from FortisAlberta?

RECORD NAME	DETAILS
<b>Historic Usage File Header (HH):</b>	<ul style="list-style-type: none"> <li>Contains summary information necessary to validate and track information contained within the file. There will be one HH record per HUF file.</li> </ul>
<b>Historic Interval Detail (HI):</b>	<ul style="list-style-type: none"> <li>A hierarchical child of the HUF header record and is the physical representation of historic interval information relevant to the site requested. HI records will only be present if the site requested is interval metered.</li> </ul>
<b>Historic Usage File Trailer (HT):</b>	<ul style="list-style-type: none"> <li>Contains summary information necessary to validate the information contained within the HUF file.</li> </ul>
<b>Historic Usage Detail (HU):</b>	<ul style="list-style-type: none"> <li>A hierarchical child of the HUF header record and is the physical representation of historic usage relevant to the site requested. Providing information exists for the requested site, there will be multiple HU records within each HUF file.</li> </ul>
<b>Historic Demand Detail (HD):</b>	<ul style="list-style-type: none"> <li>A hierarchical child of the HUF header record and is the physical representation of historic demand relevant to the site requested. HD records will only be present if the requested site is demand metered or billed upon a contracted demand. These records provide detailed demand information relevant to the historic usage periods disclosed in the HU records.</li> </ul>

9. Where can a Retailer obtain additional information about Rule 010?

To obtain additional information regarding Rule 010, please visit the AUC website

<http://www.auc.ab.ca/pages/rules/rules-home.aspx>

## APPENDIX A – FORTISALBERTA WINTER DISCONNECT POLICY

In January 2004, the Alberta Government introduced legislation that restricts WSPs from fully disconnecting any residential or farm service for non-payment between October 15<sup>th</sup> to April 15<sup>th</sup>, or if the temperature is forecasted to be below 0 degrees Celsius in the 24-hour period immediately following the proposed disconnection in same time frame. FortisAlberta implemented processes to support the Winter Disconnect Policy in February 2004. In January 2005, the AUC offered an upgrade to the interpretation of vacant sites and the obligation to fully disconnect or limit vacant site premises.

As an owner of an electric distribution system, FortisAlberta cannot reasonably determine the existence of a “Customer” at a site. The *Electric Utilities Act* (Alberta) defines a Customer as: “a person purchasing electricity for that person’s own use”. As FortisAlberta does not sell electricity, it must rely on a Retailers de-energize for vacant premise request as proof of the absence of a Customer at the site. It should be noted that the absence of a Customer does not necessarily mean there are no ongoing obligations on the part of FortisAlberta or the Retailer regarding Distribution Tariff Services, as Distribution Tariff Service charges may still apply (such as where a person has agreed to pay IDLE charges or the Minimum Charge).

<b>FORTISALBERTA’S DISCONNECT POLICY BETWEEN OCTOBER 15 TO APRIL 15</b>				
<b>SERVICE TYPE</b>	<b>DISCONNECT FOR NON-PAYMENT (0002)</b>		<b>DISCONNECT FOR VACANT SITE (0006)</b>	
	<b>INSTALL A LIMITER</b>	<b>FULLY DISCONNECT</b>	<b>INSTALL A LIMITER</b>	<b>FULLY DISCONNECT</b>
<b>RESIDENTIAL</b>	Yes	No	Yes	No
<b>CENTRALLY METERED APARTMENTS/CONDOS</b>	Yes *If remote disconnect meters are available	No	Yes *If remote disconnect meters are available	No
<b>FARM</b>	No	No	No	No
<b>COMMERCIAL</b>	No	Yes	No	Yes
Please Note: (A) any services with a critical to have power flag within the UCI will not be disconnected or have a limiter installed. (B) this policy also applies between April 15 and October 15, or when the temperature is forecasted to be below zero (0) degrees Celsius in the 24-hour period immediately following the proposed disconnection.				

- FortisAlberta can limit centrally metered apartments or condos which have remote disconnect meters installed for their individual unit, as these limiters do not require a manual reset. When a customer exceeds the load limit on these meters, the limiter will trip the meter off and will reset itself after 15 minutes.
- We will NOT limit any sites where the customers do not have access to limiter.
- We will NOT limit any farm sites. The reason for this is in most cases the limiter would not hold due to the load on a site.

## **Residential Services:**

### **Cut Off for Non-Payment (DER - 0002)**

- Upon the request of a Retailer, FortisAlberta will install a limiter on the service within a reasonable period.
- The limiter will remain on the service until:
  - FortisAlberta is notified by the Retailer to remove the limiter and restore power; OR
  - FortisAlberta is notified by the Retailer to remove the limiter as soon as reasonably practical after April 15<sup>th</sup>. The Retailer will submit a DER 0002, sub-code 1302, in order to have the limiter removed after April 15<sup>th</sup>. FortisAlberta will proceed to fully disconnect the service provided however that the temperature is forecast to be above 0 degrees Celsius in the 24-hour period immediately following the proposed disconnection.

**Note:** Services will not be fully disconnected between October 15<sup>th</sup> and April 15<sup>th</sup> and distribution and transmission charges will still flow through to the Retailer until such time as full disconnection is completed.

### **Vacant Premises (DER - 0006)**

- Upon the first request of a Retailer (DER 0006, sub-code 1301), FortisAlberta in most cases will leave a door tag at the service indicating that disconnection will occur within a reasonable period thereafter.

**Note:** FortisAlberta, acting reasonably and using discretion<sup>1</sup>, reserves the right to disconnect, or limit power during the winter season, for vacant premise on the first request.

- If a remote disconnect meter is installed on a customer's individual unit, FortisAlberta has the capability to limit these meters remotely, as these limiters do not require a manual reset. When a customer exceeds the load limit on these meters, the limiter will trip the meter off and will reset itself after 15 minutes.
- Upon the second request from a Retailer (DER 0006, sub-code 1302), FortisAlberta, acting reasonably, will:
  - Fully disconnect the site
    - if the site appears to be vacant in the view of FortisAlberta, or
    - If the service is in a centrally heated facility
  - Install a remote capable meter with limiter functionality if the site appears to be occupied in the view of FortisAlberta, to have the ability to remotely limit in future if required.
    - FortisAlberta may not be able to install a limiter on some apartment services due to the type of metering found in some apartment buildings. In such cases, these special metered apartments will not be fully disconnected between October 15<sup>th</sup> and April 15<sup>th</sup>.
  - After April 15<sup>th</sup>, the Retailer can instruct FortisAlberta to fully disconnect the service provided that the temperature is forecasted to be above 0 degrees Celsius in the 24-hour period immediately following the proposed disconnection.
- If a limiter is installed, the limiter will remain on the service until such time as:

- FortisAlberta is notified by the Retailer to remove the limiter and restore power;  
OR
- FortisAlberta is notified by the Retailer to remove the limiter as soon as reasonably practical after April 15<sup>th</sup>. FortisAlberta will proceed to fully disconnect the service provided however that the temperature is forecast to be above 0 degrees Celsius in the 24-hour period immediately following the proposed disconnection.

**Note:** Distribution and transmission charges will still flow through to the Retailer until such time as full disconnection is completed

### **Residential Services – Centrally heated Apartments and Condos:**

#### **Cut Off for Non-Payment (DER - 0002)**

- Upon the request of a Retailer, FortisAlberta will install a limiter on the service within a reasonable period. However, there are instances where FortisAlberta may not be able to install a limiter due to the type of metering found in some apartment buildings. In such cases, these special metered apartments will not have a limiter installed and will not be fully disconnected between October 15<sup>th</sup> and April 15<sup>th</sup>.
  - After April 15<sup>th</sup>, the Retailer can instruct FortisAlberta to fully disconnect the service provided that the temperature is forecasted to be above 0 degrees Celsius in the 24-hour period immediately following the proposed disconnection.
- If a remote disconnect meter is installed on a customer's individual unit, FortisAlberta has the capability to limit these meters remotely, as these limiters do not require a manual reset. When a customer exceeds the load limit on these meters, the limiter will trip the meter off and will reset itself after 15 minutes.

**Note:** Services will not be fully disconnected between October 15<sup>th</sup> and April 15<sup>th</sup> and distribution and transmission charges will still be flow through to the Retailer until such time as full disconnection is completed.

#### **Vacant Premises (DER - 0006)**

- Upon the first request of a Retailer (DER 0006, sub-code 1301), FortisAlberta in most cases will leave a door tag at the service indicating that disconnection will occur within a reasonable period thereafter.

**Note:** *FortisAlberta, acting reasonably and using discretion<sup>1</sup>, reserves the right to disconnect, or limit power during the winter season, for vacant premise on the first request.*

- If a remote disconnect meter is installed on a customer's individual unit, FortisAlberta has the capability to limit these meters remotely, as these limiters do not require a manual reset. When a customer exceeds the load limit on these meters, the limiter will trip the meter off and will reset itself after 15 minutes.
- Upon the second request from a Retailer (DER 0006, sub-code 1302), FortisAlberta, acting reasonably, will:
  - Fully disconnect the site
    - if the site appears to be vacant in the view of FortisAlberta, or
    - If the service is in a centrally heated facility

- Install a remote capable meter with limiter functionality if the site appears to be occupied in the view of FortisAlberta, to have the ability to remotely limit in future if required.
  - FortisAlberta may not be able to install a limiter on some apartment services due to the type of metering found in some apartment buildings. In such cases, these special metered apartments will not be fully disconnected between October 15<sup>th</sup> and April 15<sup>th</sup>.
- After April 15<sup>th</sup>, the Retailer can instruct FortisAlberta to fully disconnect the service provided that the temperature is forecasted to be above 0 degrees Celsius in the 24-hour period immediately following the proposed disconnection.
- If a limiter is installed, the limiter will remain on the service until such time as:
  - FortisAlberta is notified by the Retailer to remove the limiter and restore power; OR
  - FortisAlberta is notified by the Retailer to remove the limiter as soon as reasonably practical after April 15<sup>th</sup>. FortisAlberta will proceed to fully disconnect the service provided however that the temperature is forecast to be above 0 degrees Celsius in the 24-hour period immediately following the proposed disconnection.

**Note:** Distribution and transmission charges will still flow through to the Retailer until such time as full disconnection is completed.

### **Farm Services:**

#### **Cut Off for Non-Payment (DER - 0002)**

- All DER 0002 transactions are failed back to the Retailer automatically during winter months (remote and non-remote) for all farm rates (21 and 2412), except for Peigan and Ermineskin REA's; which will be limited.

#### **Vacant Premises (DER - 0006)**

- Upon the first request of a Retailer (DER 0006, sub-code 1301), FortisAlberta may leave a door tag at the service indicating no occupancy information.
- If a second request to disconnect is received from the Retailer (DER 0006, sub-code 1302), FortisAlberta will fail the order back to the Retailer with code 1323 - Seasonal/temperature disconnect policy in place. Distribution and Transmission charges will still be flowed through to Retailer.

### **Commercial Services:**

#### **Cut Off for Non-Payment (DER - 0002)**

- At the request of a Retailer and acting reasonably using FortisAlberta's discretion<sup>1</sup> – FortisAlberta will proceed to fully disconnect the service

**Note:** Distribution and transmission charges will still be flowed through to the Retailer

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<sup>1</sup> FortisAlberta discretion as described within FortisAlberta's Customer/Retailer Terms and Conditions of Distribution Tariff

**Vacant Premises (DER - 0006)**

- Upon first request from the Retailer (DER 0006, sub-code 1301), FortisAlberta in most cases will leave a door tag at the service indicating that disconnection will occur within a reasonable period thereafter;
- Upon the second request from the Retailer (DER 0006, sub-code 1302), FortisAlberta, acting reasonably and using discretion<sup>1</sup>, will proceed to fully disconnect the service.

**Note:** Distribution and transmission charges will still flow through to the Retailer.

## APPENDIX B – IMPROVEMENTS

FortisAlberta is committed to improving processes whenever possible. If you have suggestions for improving or clarifying this document, please contact:

Kirsten Lojek  
Stakeholder Relations Manager (403) 514-4572 Direct Line  
(403) 514-5572 Fax  
(403) 510-9366 Cellular

### Stakeholder Relations General E-mail

[RetailAcctReps@FortisAlberta.com](mailto:RetailAcctReps@FortisAlberta.com)

### Mailing Address:

FortisAlberta Inc.  
ATTENTION: Kirsten Lojek  
100 Poplar Street  
Red Deer County, AB  
T4E 1B4



## APPENDIX C – Common Abbreviations

ACRONYM:	DEFINITION:
<b>AUC</b>	Alberta Utilities Commission
<b>ADU</b>	Average Daily Usage
<b>AESO</b>	Alberta Electric System Operator
<b>CSA</b>	Customer Switch Advice
<b>CSE</b>	Cumulative Switch Estimate
<b>CSR</b>	Customer Switch Receipt
<b>D&amp;T</b>	Distribution and Transmission charges
<b>DCM</b>	Daily Cumulative Meter
<b>DEC</b>	De-Energize Completion
<b>DEF</b>	De-Energize Failure
<b>DER</b>	De-Energize Request
<b>DIM</b>	Daily Interval Meter Readings to Retailers
<b>DSN</b>	De-Select Notification
<b>DSR</b>	De-Select Request
<b>DTS</b>	Direct Transmission Service
<b>ENC</b>	Energize Completion
<b>ENF</b>	Energize Failure
<b>ENR</b>	Energize Request
<b>GCM</b>	Micro-Generation Cumulative Meter Consumption
<b>GIM</b>	Micro-Generation Interval Meter Reading
<b>GRN</b>	Micro-Generation Retailer Notification
<b>HD</b>	Historic Demand Detail
<b>HH</b>	Historic Usage File Header
<b>HI</b>	Historic Interval Detail
<b>HT</b>	Historic Usage File Trailer
<b>HU</b>	Historic Usage Detail
<b>HUF</b>	Historic Usage File
<b>kWh</b>	Kilowatt Hours
<b>LSA</b>	Load Settlement Agent
<b>MDM</b>	Meter Data Management
<b>PFAM</b>	Post Final Adjustment Mechanism
<b>PLT</b>	Power Lin Technician
<b>PPO</b>	Planned Power Outage
<b>RDR</b>	Revoke De-Energize Request
<b>RFU</b>	Request for Usage
<b>RIMC</b>	Retailer Information Management Committee
<b>RITS</b>	Retailer Inquiry Tracking System
<b>ROR</b>	Request Off-Cycle Meter Read
<b>RDS</b>	Revoke De-Select Request
<b>RRO</b>	Regulated Rate Option
<b>RRP</b>	Regulated Rate Provider
<b>RUC</b>	Request Update to Customer Information
<b>SCA</b>	Site Characteristic Add
<b>SCF</b>	Site Cycle Catalogue

<b>ACRONYM:</b>	<b>DEFINITION:</b>
<b>SMC</b>	Site Meter Characteristics
<b>SLA</b>	Service Level Agreement
<b>SOLR</b>	Supplier of Last Resort
<b>SRM</b>	Stakeholder Relations Manager
<b>SRN</b>	Select Retailer Notification
<b>SRO</b>	Notify Old Retailer
<b>SRR</b>	Select Retailer Request
<b>SSC</b>	Settlement System Code
<b>TBC</b>	Tariff Billing Code
<b>TBD</b>	Tariff Bill Dispute
<b>TBF</b>	Tariff Bill File
<b>TCF</b>	Tariff Bill Calendar
<b>TDN</b>	Tariff Bill Dispute Notification
<b>TRN</b>	Tariff Bill Reject Notification
<b>UCA</b>	Utilities Consumer Advocate
<b>UCI</b>	Update Customer Information
<b>WO</b>	Wire Owner
<b>WSD</b>	Wholesale Settlement Details
<b>WSP</b>	Wire Service Provider

## APPENDIX D – Word Definitions

**Act:** means the *Electric Utilities Act*, as amended from time to time;

**Alberta Utilities Commission (AUC):** means the *Alberta's independent utilities regulator*;

**Facilities:** means physical plant (including, without limitation, distribution lines, transformers, meters, equipment and machinery) on FortisAlberta's side of the Point of Service, excluding a Transmission Facility;

**Point of Service:** means the point at which FortisAlberta's service conductors are connected to the Customer's conductors or apparatus;

**Retailer:** means a person, selected by the Customer, or otherwise to whom the Customer is defaulted in accordance with the Act and Regulations, who carries out the duties of a Retailer prescribed in the Act, including also Self-Retailers who procure Electricity Services for their own use as a Customer;

**Rule 004:** Alberta Tariff Billing Code.

**Rule 010:** Rules on Standards for Requesting and Exchanging Site-Specific Historic Usage Information for Retail Electricity and Natural Gas Markets.

**Rule 021:** Settlement System Code Rules.

**Self-Retailer:** means a person that is a "customer" as defined in the Act which is carrying out the functions of a Retailer; to obtain electricity for the customer's own use"

**Site Cycle Catalogue (SCF):** means a physical electronic file that provides a common format for distributors to disclose site and billing cycle data to a Retailer for cross-referencing sites with a Distributor's billing cycle;

**Tariff Bill Calendar (TCF):** means a physical electronic file that provides a common format for distributors to disclose yearly tariff billing cycle schedules to Retailers;

**Tariff Bill File (TBF):** means a physical electronic file containing site-specific tariff charges, usage, and demand information for given tariff bill periods; it may also contain applicable site-specific one-time charges.