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Introduction to the Retailer Guidebook

This Retailer Guidebook has been created to communicate the essential information and to assist Retailers to operate their business in the EPCOR Distribution & Transmission Inc. (EDTI) service area.

This guide outlines the following EPCOR Distribution & Transmission Inc. responsibilities:

- Retailer Certification Requirements, including the steps required to become a certified retailer,
- Site Enrollment, Energizes and De-Energizes,
- Retailer Support and Service Order Inquiries,
- Distribution & Transmission Tariff Billing,
- Metering Inquiries,
- Micro-gen Site Management,
- Site ID Management, including Site ID Retirement, and
- VL Trader File Management.

The key objective of this document is to provide Retailers with a tool to assist them in aligning their processes, practices and information systems with those of EPCOR Distribution & Transmission Inc.

This document was created to assist Retailers and should not be considered definitive or to supersede any AUC (Alberta Utilities Commission) rules, acts, or regulations. EDTI will make reasonable efforts to update and maintain this Guidebook.

For additional information or questions about this Retailer Guidebook, please contact:

Market Support
EPCOR Distribution & Transmission Inc.
(780) 412-7899
retcomm@epcor.com

Getting Started – Retailer Certification

Step 1 - Application and documentation

Please send request for certification via email to EPCOR Market Support at retcomm@epcor.com, including the following:

- Retailer and Retailer ID
- Billing Agent contact or an IT contact for VL Trader setup
- Email address of the signing authority within the Retailer organization for contractual purposes
- Alberta Electric System Operator (AESO) certification letter for the Edmonton Zone
- Start date of Retailer operations

The Retailer requirements for certification are defined in [EDTI's Terms & Conditions for Distribution Access Service](#).

Step 2 - Security requirement

Retailers are required to post security as outlined in the Distribution Tariff Regulation.

EPCOR Market Support will provide the following:

- [Prudential Requirement Calculation Sheet](#)
To assist in calculation of the security requirement outlined in the Distribution Tariff Regulation
- [Sample of the Retailer Certification Package](#)
To be reviewed and signed by the Retailer through EDTI's AdobeSign software, which includes a Service Agreement, Statutory Declaration and Representation & Warranty document

Step 3 - Approval

The EPCOR Market Support team will verify the Retailer's security requirements have been met, all required documentation has been submitted and will complete set up of the Retailer to send and receive market transactions.

Retailer Support

The Market Support team is located in Edmonton and provides service for all Retailers in the EDTI territory.

Market Support can be reached through email at retcomm@epcor.com. This email account is available during business days between the hours of 7:30AM to 4:00PM. Market Support can also be reached by phone at 780-412-7899.

Responsibilities

The Market Support team investigates and resolves Retailer inquiries such as the following:

- enrollments and erroneous enrollment,
- energizes and de-energizes,
- meter testing and consumption disputes,
- EDTI tariff and demand billing inquiries,
- site id assignment and retirement,
- site inspection permit information,
- microgeneration
- meter installation status, and
- downgrading meter type status.

Retailer Enrollment

EDTI manages all enrollment processing within the EDTI territory as described in [AUC Rule 021](#). Retailers are responsible for the following:

- Initiating enrollment through the standard transactions described in [AUC Rule 021](#).
- Obtaining proper authorization from their current or prospective customers before initiating any customer related transaction, including consumption history, and enrollment.
- Accuracy of enrollment transactions submitted to EDTI. A Retailer that erroneously enrolls a site will bear responsibility for the associated Distribution Tariff costs and any other financial implications associated with the error.
- Providing up-to-date basic customer information (including emergency contact name, addresses and phone numbers as well as name, address and phone numbers for the financially responsible party) for all enrolled sites, as EDTI requires emergency contact information for all sites in our service area. This information is provided to EDTI via VL Trader through the UCI (Update Customer Information) transaction, as described in [AUC Rule 021](#).
- If a Retailer wishes to terminate its ownership of a particular site, they must provide a DSR (De-Select Request), via VL Trader, as described in [AUC Rule 021](#).

A Site is identified by a unique Site ID number and must be enrolled with a Retailer before energy can flow. Site ID information is available in EDTI's [Site Catalogues](#).

Energize Notification Request (ENR)

Retailers can choose among 4 priorities of service for ENR orders. The priorities of ENR (Energize Requests) are listed below:

Priority 1: Urgent Reconnect – Within 24 hours

Priority 2: Rush Reconnect – Within 48 hours

Priority 3: Standard Connect – Within 48 hours

There is no expectation EDTI can meet the above priorities on non-business days

Priority 4: New Construction - Standard within 8 business days energize request on a new meter installation after the electrical permit has passed inspection.

For more information on priorities of ENR files, please refer to [AUC Rule 021](#), Appendix A, Table A-13.

If there is electricity load present at the site, the ENR order may be failed due to safety. ENR transactions will be failed if the Retailer has not sent the SRR transaction first to enroll the customer.

An ENR may be cancelled, upon request, after the ENR transaction is sent by emailing Market Support at retcomm@epcor.com during regular business hours, 7:30AM MT to 4:00PM MT Monday to Friday, excluding holidays.

AFTER HOURS Process

The After Hours process must be used by Retailers outside of the Market Support office business hours, after 4:00PM MT and on weekends and holidays, when the following situations arise:

- P1 and P2 Priority ENRs are created after regular business hours, or
- Access instructions have changed on a Priority 1 or a Priority 2 ENR already received by EDTI.

An email (suggested template on page 9) will need to be sent to EDTI Trouble Dispatch at eerdispatch@epcor.com.

Successful completion of After Hours ENR requests are dependent on the following circumstances:

- The Field Crew must have access instructions to the meter, and
- Panel breakers must be off.

Medical Emergency Energize

Medical emergencies are defined as:

- Life threatening situations, or
- Weather related situations, extreme heat or cold

In the event of an emergency situation **during** business hours, please refer to the following process:

- The Retailer will send a Priority 1 ENR transaction to EDTI, and
- The Retailer will call Market Support at 780-412-7899 to alert them that a medical situation exists and to send a crew out immediately

In the event of an emergency situation **after** business hours, please refer to the following process:

- The Retailer sends a Priority 1 ENR transaction to EDTI,
- The Retailer sends an email to eerdispatch@epcor.com (template on page 9) that clearly states "MEDICAL EMERGENCY", and
- The Retailer will call 780-412-4500 to alert them that a medical situation exists and to send a crew immediately

Emergency De-Energize

In the event EDTI Emergency Dispatch receives a phone call from Police, Fire or D&T Personnel requesting power services to be de-energized, the business process below will be followed:

1. EDTI Emergency Dispatch receives an Emergency De-energize request, complete with location, party requesting the service, and reason for the De-energize request.
2. The Emergency Response crew completes the required work and records the appropriate information.

On the next business day the information for a DER- SAFETY work order is entered, an email notification and a De-energize Completion (DEC) transaction are sent to the Retailer.

Trouble Dispatch Email Template

Date/Time of Contact:

Name of Caller/Business Partner:

Phone Number:

Service Address:

Site ID#/ PoD#:

Advised to Turn Breakers Off

Action Requested:

P1 – Urgent ENR (Emergency/ Life threatening/ DSO/Retailer Error)

P2 – Expedite ENR

P3 – Standard Energize

P4 – New Construction (EDTI Only)

Reason for Contact:

Entry Instructions:

Created by:

Completed by:

Winter Rules

The [Distribution Tariff Regulation](#), Alberta Regulation 162/2003, states the distributor must not disconnect the customer:

1. at any time during the period of October 15 to April 15, or
2. at any other time when the temperature is forecast to be below 0 degrees Celsius in the 24 hour period following the proposed disconnection

EDTI applies Winter Rules to disconnect requests for non-payment or vacancy.

Load Limiting

EDTI uses two types of Load Limiting options during Winter Rules, 1) a physical load limiting device, 2) AMI load limiting program. Below are the details for each option:

1. Physical Load Limiting Device
 - Physical limiters have been used in previous Winter Rules periods and will continue to be an option for sites that do not have an AMI meter.
 - This type of limiter is a physical device that is installed on the meter to limit power.
 - EDTI requires access to the meter for installation and removal.
 - Limits power to 120 Volts.
 - Restricts the site to 15 amps of load.
 - If load capacity is reached, the device breaker will trip resulting in a loss of power to the site until the device is manually reset by the customer.
 - To end the power outage, the customer presses a switch on the device.
2. AMI Load Limiting Device
 - This type of limiter is a program which is sent remotely to the meter through the AMI network eliminating the need for a site visit by EDTI.
 - Can be applied to residential customers including apartment suites and single dwelling homes.
 - The program provides 240 volts of power and allows for the use of 240 volt devices.
 - The program provides 420 watt hours of energy consumption within a 15 minute period which is enough to heat a home, have a few lights on, and provides the ability to do some cooking.
 - If the energy consumption limit is exceeded within the 15 minute period, the customer will experience a power outage for 15 minutes.
 - Power outage will end and power will return to the site automatically after the 15 minutes has elapsed. There is no switch for customers to press to reset power.
 - For safety reasons, the program will not initiate a power outage more than twice within a one hour period.

Both load limiting options can be removed from a site when a Retailer sends an energize transaction to restore services to the site.

Micro-Generation

On February 1, 2008, the Government of Alberta passed the [Micro-Generation Regulation](#). This regulation allows Albertans, using renewable resources or alternative energy, to generate their own environmentally friendly electricity and receive credit from any excess electricity they send into the electricity grid. According to the AUC Micro Generator Application Guideline the following criteria apply:

“In Alberta, micro-generation is defined as being the generation of electrical energy from a generating unit with a total capacity of one megawatt (MW) or less, is connected to the distribution system, exclusively uses sources of renewable or alternative energy (such as solar photovoltaic, small-scale hydro, wind, biomass, geothermal and fuel cell) and the electrical energy output is intended to meet all or a portion of the customer’s electricity needs. Owners of electrical distribution systems are expected to provide connection services for micro-generators.”

If you wish to apply for Micro Generator interconnection within the EDTI Distribution system, a step by step guide can be found on the Epcor website under [Becoming a Micro-Generator](#).

For additional information, please refer directly to the AUC Website on [Micro-generation](#).

Metering Services

EDTI provides and maintains all revenue meter services within its service area. EDTI is accredited by Measurement Canada to provide these services. EDTI will own, install, seal and approve the meters for all sites on its distribution system.

AMI (Advanced Metering Infrastructure)

The power meter at your home or business records and stores the number of kilowatt-hours of electricity you use. An advanced meter encrypts this usage data and transmits it to EPCOR. This means we will be able to get your power meter reading without visiting your yard, home or business every month like we do now.

Complete information on AMI can be found on the Epcor website under [Advanced Meters](#).

Interval Metering

If a site's meter multiplier is less than 180 and registers over 150 kVa three times in the previous 365 days, the site will require an interval meter. Also, if a site's meter multiplier is greater than 180 and registers over 150 kVa twice in a year, the site will require an interval meter. Once an interval meter has been installed, it will not be removed unless a downgrade is requested by the customer and approved by EDTI as per our [Terms & Conditions](#).

For new customers moving into an existing site, EDTI will use the existing demand history of the site.

Unmetered Sites

For Distribution Access Service for all Points of Service where energy consumption is small and can be easily predicted. The estimated consumption will be based on equipment nameplate rating and operational patterns per our [D&T Access Service Tariffs](#).

Pulse Cards

Upon written request to [Market Support](#), the Customer may access pulse data directly from its interval meter. Requests for pulse cards can be made directly from the Customer to Market Support.

Request for Historical Usage File (HUF)

Retailers may request historic usage information from EDTI for a period of 425 days from the date of request permitting the Retailer has filed a [Representation and Warrant Document](#) to EDTI.

Email: retcomm@epcor.com

Additional information pertaining to historical usage is specified in [AUC Rule 010](#).

Metering Disputes

It is the Retailer's responsibility to assist their Customers who are concerned about their electricity consumption. If a Retailer disputes a meter reading, the Retailer may request an off-cycle read (ROR). EDTI will read any of its meters at the request of the Retailer, subject to the charges set out in the [Distribution Access Service Tariff Fee Schedule](#).

In the event that the off-cycle read shows that a prior recorded reading is incorrect, then the cost of the off-cycle read will be waived.

If a resolution of the dispute between the Customer and Retailer cannot be met, the Customer can schedule a meter test through Market Support. Should the meter test fail Measurement Canada Standards, the cost of the testing and EDTI effort will be billed to the Customer. No fees will be charged in the event of a passed test. The Customer has the option to be present at the time of the meter test.

Reading a Meter

EDTI's [Meters](#) page provides vital information on reading meters, when your next meter reading is scheduled and how to submit online meter readings.

Customer supplied readings may be submitted through the following link:

[Submitting Your Electric & Water Meter Reading | EPCOR Power](#)

Site Directories

[Site directory](#) information, such as meter reading schedules or Tariff Bill File (TBF) release dates, can be found in the Site Cycle File (SCF) and the Tariff Bill Calendar File (TCF).

A retailer can align customer bill production for each site according to the tariff bill publish date for a billing cycle reported in the tariff bill calendar file and a site's tariff billing cycle reported in the site cycle catalogue file.

FAQ (Frequently Asked Questions)

How would a potential customer obtain a Site ID?

To obtain a Site ID, an electrical permit needs to be obtained from the City of Edmonton. Once the permit is approved and sent to EDTI, the Site ID will be created and uploaded to the [Site ID Catalogue](#) (SID). This is also applicable to address changes for Site IDs.

I received confirmation of an address change. Why was the Site ID Catalogue not updated?

EDTI updates its Site ID Catalogue daily. Please ensure you download the most recent Site ID Catalogue.

If you have downloaded the most recent Site ID Catalogue and are still unable to confirm the updated address, please email Market Support at retcomm@epcor.com.

There is a discrepancy between our records and what the customer says is at the site. How can I investigate an address or meter number discrepancy?

Please email all details related to the discrepancy to Market Support at retcomm@epcor.com. Often a site visit is required to resolve the issue, so it is important to include customer contact information so that our crews can schedule access to the site and/or meter.

We have a site de-energized, with no meter and no customer. Why isn't the site retired?

EDTI retires sites after two years of permit inactivity, no meter and is de-energized. This is an automated function that is run every year in December. Once retired, a Notify Old Retailer (SRO) transaction will be sent through VL Trader.

What information is required in a request sent to Market Support?

Please be specific in your request and include all relevant details, such as a site id and address. Please include the specific meter numbers, date spans and transactions (i.e. TBF), where applicable.

We created an ENR order for a new site and the meter has not yet been installed. Why not?

The site may be blocked from energizing while EDTI is waiting for The City of Edmonton to send approved electrical permits. Another scenario could be if an area has not had a transformer installed, typically in new neighborhoods. Please contact Market Support at retcomm@epcor.com or 780-412-7899 to confirm ENR status.

What are the costs associated with ENR requests?

All costs for Miscellaneous Services, including ENR requests, can be found in the [D&T Access Service Tariffs](#)