Resolved Issues

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
01	Tax Exempt: Does the ESP currently get Tax Exempt status on 810? Is the ESP required to have certificates for existing exempt customers? (New West Energy)	10/13/99	Billing		11/10/99	11/10/00 End-use customer responsibility to provide tax exemption status to each of their providers. 02/02/00 Bill Rigsby to bring tax statues to Billing on 02/09/00 for clarification. May be included in recommendation. Resolution still stands.		Resv
02	Credit/Debit Amount by record (APS)	10/13/99	Billing		11/10/99	Will be added to Implementation Guide as an optional code. 02/02/00 Resolution still stands.		Resv
03	Balance (BAL) vs. Total monetary value summary (TDS) for invoice payment. Issue for UDC, they cannot bill past due charges since they may not be aware of payment amounts and dates.	10/13/99	Billing		11/10/99	UDC will not send payment information to ESP because ESP is covering customer's receivable to UDC. 02/02/00 Resolution still stands. UDC will send current charges only for ESP consolidated billing. 02/08/00 Revisit when the Implementation Guide is written.		Resv
04	Invoice Start & End Date: Do we need to state on bill?	10/13/99	Billing		10/13/99 02/02/00	Rule Language (R14-2-1617) states "time period to which the reported information applies" 02/02/00 Proposed rule has changed. Consensus that both parties shall disclose this information (R14-2-210). Resolution stands.		Resv
05	Reason for Estimate - Do both parties need to give?	10/13/99	Billing		11/10/99	No, Billers responsibility to print this in bill using 867 standard estimation reason codes. See Business Rules. 02/02/00 Resolution stands.		Resv
06	Should non-utility charges be included on ESP consolidated	10/13/99	Billing		11/10/99	UDC cannot pass charges for non-utility related charges for printing on an ESP Consolidated Bill. Example: home security, Internet services.		Resv

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	bills? (New West Energy)					02/02/00 Resolution stands.		
07	How will Rebate/Rebill be handled? (APSES/New West Energy) ESP	10/26/99	Billing			Confirm this as a business decision. Will this be handled as cancel/rebill or adjustment line item. This can be translated to EDI rule. Issue can be raised in 12/03/99 PSWG Meeting. UIG recommends cancel/rebill scenario. Most UDCs can support the cancel/rebill scenario. MRSP must post corrected EDI 867s for retrieval by all parties. Three categories of Billing Adjs. 1. Usage Related (dead meter, bad multiplier, etc.) Cancel/rebill 2. Rate related (incorrect rate calculation) Cancel/rebill 3. Non–usage related (flat rate, tax changes) Misc. Adjustment 02/02/00 Still an issue. Also, what happens if ESP or UDC discovers a need to backbill and customer has switched several times since original billing took place. (R14-2-210E) See Cancel/Rebill discussion document. 03/08/00 Action: (APS) will bring a copy of an actual 810 showing a cancel/rebill and how it is represented in EDI format. (All UDCs) need to report on their cancel/rebill thresholds. (All participants) need to identify business issues in relation to rebate/ rebill and misc. adjustments. (ESPs) will bring actual scenarios of their experiences in CA. 03/22/00 Discussion re: way of communicating specified rebate/rebill information outside of the 810 for interim. Action: UDC's to discuss the interim proposal and be prepared to discuss outcome. 04/06/00 UDC's still evaluating long term and short term process. Action: UDC's to complete review of items for rebill data. Determine short term process we can commit to.	1	Resv

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						05/24/00 APS and TEP suggested changes to BEN and Rebate/Rebill notifications. Action: (Janie Mollon) will incorporate and distribute implementation plan, implementation guide and samples for review by 06/06/00. Proposed notification processes will be presented at 06/22/00 Billing and PSWG meetings. 06/22/00 Proposal approved by Billing subcommittee.		
08	UDC Information - Does UDC have to pass contact information address, etc. on each transaction – including the ACC phone number?	10/26/00	Billing		02/24/00	02/02/00 (Stacy Aguayo) contacted two ESPs. Their preference is to have static information, such as emergency numbers, etc. not passed each time on the 810 document every time a customer bills. More discussion by market participants is needed. 02/08/00 (New West Energy) If UDCs continue to pass static data, they will null it in their system. Proposal: UDC will provide the UDC emergency contact number and ACC dispute phone number once. ESP will provide this information on each bill. UDC will advise ESP 30 days written notice in advance of any change to this information. 02/24/00 UDCs will make available to PSWG a consolidated list of UDC Emergency Contact Numbers. Responsibility of UDCs to communicate to subsequent ESPs the UDC Contact Number and ACC dispute number to ESP when ESP Service Agreement is executed. Long-term Solution: UDC will provide UDC emergency contact numbers and ACC number to ESP at time of certification with UDC. 02/24/00 Proposal above was accepted.		Resv
09	Are tables graphs applicable this year/last year/last month?	10/26/00	Billing		02/24/00	This data will not be passed on 810 to ESP for Consolidated Billing. 02/02/00 Resolved pending rule investigation.		Resv

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						02/08/00 No requirements found in Rules. UDC will not pass this information and ESP is not required to print this information on bill. 02/24/00 Issue resolved. 810 will not have a place to pass last months/last years consumption for ESP to place in a table.		
10	Business, Regulatory Notices and advertising messages - How to handle? What would be size (# of lines) and content/placement on the bill? Example: disconnect notices, Levelized changes, capital credits. How do we anticipate handling non-regulatory messages on the bill.	10/26/99	Billing		03/08/00	Need to offer a bill message field on the guide to pass Regulatory or Business information. Advertisements would be handled through contractual agreements between ESP and UDC. 02/02/00 Action: Utilities to research their company's bill message size, # of characters, # of bill messages used. 02/08/00 Action: UDC to come back with type of bill messages they intend to send for ESP Consolidated billing. Shirley Renfroe will bring information from CA, CUBR, UIG. Proposal for broadcast message types: UDC will post ACC or Legislated mandatory/regulatory messages on their web site in a timely manner and notify ESP contact there is a new message to be printed on the customer's bill. ESP will retrieve new message verbiage from UDC's web site. Proposal for customer specific messages: UDC will pass ACC or Legislated mandatory/regulatory message with customer's bill data. This will transmit via normal billing process agreed upon between the UDC and ESP. ESP is required to print message on UDC portion of consolidated bill. Advertising and business messages will not be passed by UDC to ESP for printing on bill.		Resv
11	Will ESPs want to partake in SurePay? (Debit ESPs Bank Account for monies owed to the	10/26/99	Billing		11/10/99	Contractual agreement between ESP and UDC. 02/02/00 Resolution applies.		Resv

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	UDC)							
12	3rd party Billing - (Should UDC continue to offer?)	10/26/99	Billing		11/10/99	Arrangement will need to be made between Biller (in this case the ESP) and their customer. 02/02/00 Resolution applies.		Resv
13	Payment Date appearing on customer's bill.	10/26/99	Billing		11/10/99	Payment date, payment amount and payment received date will not be passed to the ESP on 810 for printing on an ESP Consolidated Bill. 02/02/00 Resolution applies. Since UDC does not know when or if a payment is actually received from the customer in ESP Consolidated Billing, this information will not be passed.		Resv
14	Transmission Charge - Should it be displayed on the bill?	10/26/99	Billing		11/10/99	This will be settled with the Scheduling Coordinator. 02/02/00 Any transmission charge identified as an end-use customer charge will be included in UDC portion of bill. All other charges will be settled with Scheduling Coordinator. Example: Fixed must run charges are identified as an end use customer bill. Resolution stands.		Resv
15	Does standardization need to allow for Summary Billing - ESP Consolidated Billing?	11/10/99	Billing		02/02/00	UDC would need to pass service periods. Would UDC un-summarize customer's bill for ESP Consolidated Billing? (New West Energy) Biller of end use customer is entity that should summarize the bill. (TEP) not supporting summary billing for Direct Access customers due to cash flow issues. In their proposed tariff (Article 24), but they have not been approved. 02/02/00 (APSES) Biller of end use customer should summarize the bill. (SSVEC - Barry Scott) -- Entity doing billing should provide consolidation. Customers will resist having bills coming from all over the place. In some respects, this would be a step back to go from one bill for electrical service to many.		Resv

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16	Will ESPs be required to remit charitable contributions (SHARE/Hero)?	11/10/99	Billing		04/06/00 see Issue 43	Discuss 12/03/99 at PSWG meeting. (New West Energy) Does not want to be responsible for tracking and remitting funds back to UDC for distribution to the charitable organizations. 02/02/00 (APSES) agrees with New West Energy's position. ESP is liable for remitting the pledge amounts to UDC potentially before customer actually pays ESP. (SSVEC - Barry Scott) - Entity producing bill should be responsible for collecting entire payment. They should disburse money accordingly. It will become a quagmire if each competitive entity only feels a responsibility to collect their piece of the pie. (How will we ever handle delinquents and partial payments?) This does not even consider resentment customers will feel about having to send checks to all of these diverse places to make sure their electrical bill is paid. This reasoning should apply to charitable programs as well, for example "Operation Roundup". 02/08/00 Who is responsible for paper-work if customer wants to remit charitable contributions 03/22/00 Action: UDC's determine what their position is, why they do SHARE program, implications if they don't , and a proposal of how to handle this issue. 04/06/00 (ACC - Bill Rigsby) Nothing in rules requiring UDC's or ESP's to remit charitable contributions. (TEP) will only offer charitable contributions for Dual Billing. They will not offer it with ESP Consolidated. Currently undecided on UDC Consolidated billing. (APS) will continue to offer it on all billing options and will maintain the "paperwork". (Trico) thinks they would offer it, but need to evaluate this further. (New West Energy) flexible as long as they don't have to deal with the "paper work".		Resv

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						Resolution: There are no regulatory requirements for ESPs to remit payments. An agreed upon arrangement between ESP and UDC would need to be in place to offer any charitable contributions.		
17	Will ESPs support levelized UDC billing line items?	12/01/99	Billing		02/24/00	Could be a hindrance for a customer to go Direct Access (in the case of a large debit balance). ESPs would not want this large debit balance passed to them for payment. More input from ESPs and UDCs needed. 02/02/00 (APS) plans to offer this option if they are Billing entity. (TEP) is not planning to offer this billing option for DA Customers. (SSVEC - Barry Scott) Any customer desiring to go to competitive access should settle all of their accounts with UDC first. If we will handle the process as we currently do for a customer going from one UDC to another we will be better off. 02/08/00 (SRP) will offer Levelized to customers for UDC Consolidated and Dual billing for distribution charges only. (APS) doesn't offer Levelized for ESP Consolidated. (TEP) doesn't offer levelized billing for DA customer regardless of billing option. Proposal: ESP has option to offer levelized billing to end use customer. UDC will not pass levelized billing line items for ESP Consolidated billing. 02/24/00 Above proposal accepted.		Resv
19	Once troubleshooting process has taken place, and UDC is estimating (an MRSP did not deliver data in a timely manner or the read could not be	02/02/00	Billing			Need to specify under what conditions the UDC could estimate a bill and pass this information to the ESP. 02/24/00 (APS - Shirley Renfroe) reported the EDI 810 allows for an estimation reason code to be passed to ESP.	1	Resv

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	retrieved), should UDC transmit estimation reasons for ESP Consolidated Bill.					Proposal: If MRSP fails to provide a meter read and the exception processing window has passed, UDC may estimate and provide an indicator why bill was estimated. ESP is required to print this reason on UDC portion of the bill pursuant to Rule 14-2-210-6B. 03/08/00 Reason codes need to be developed before this can be resolved. 04/06/00 Resolution: Use a reason code of: Meter Data not available 10/19/00 Resolution Stands, issue resolved		
20	Can other utility service charges be passed to ESP for Consolidated Billing (gas, water, sewer, telephone, etc.)	02/02/00	Billing		02/02/00	02/02/00 May not be in scope of the PSWG charge. We are focusing on transfer of electric information only. May need to be addressed at a later date.		Resv
21	DA Market Issue – for UDC or Dual billing options, will Summary Billing be available for DA customers? UDC/Dual	02/02/00	Billing			02/02/00 (TEP) will not offer Summary Billing per pending Article 24. (APS) feels it is a billers service. If APS is the biller they will offer these services. (SRP) will offer these services for Dual or UDC Consolidated Billing. 10/12/00 – group agreed this was for info only and resolved – this is an entity specific issue.	3	Resv
22	If customer has a credit or debit balance when they switch to DA, is the utility obligated to refund that money?	02/02/00	Billing		03/08/00	02/08/00 Levelized / Equalizer was briefly discussed regarding debit or credit balances. 02/24/00 APS will final out standard offer account and bill customer separately if there is a debit. If customer does not pay and is eligible for disconnect, they notify ESP. If there is a credit they will refund this to customer prior to the switch for DA. Proposal: When customer goes DA and they have a **credit** balance, with the exception of Capital credits, UDC will apply it to any outstanding		Resv

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						receivable owing. UDC will then refund remaining credit directly to customer in accordance to their applicable Rules and Regulations. When customer goes DA and they have a **debit** balance, it will be the sole responsibility of UDC to collect money from customer.		
23	If utility is holding a customer deposit and customer switches to ESP consolidated billing, is the utility required to refund entire deposit since receivable is paid to UDC by ESP?	02/02/00	Billing		04/06/00	(APS - Stacy Aguayo) went over flow chart for Deposit Process for ESP Consolidated billing and Deposit Process for UDC consolidated billing (see attachment to 02/24/00 Billing minutes) 03/08/00 There is no formal Rule requirement dictating deposit refunds for ESP Consolidated billing customers. Current business processes have been identified (see flow) for TEP, SRP and APS. Other UDCs can submit their deposit business processes to the Billing Subcommittee Chairperson. Deposit requirements are to be determined by the individual companies based on their individual credit policies. No further action needed.		Resv
24	When UDC estimates the bill in ESP Consolidated billing, an agreed upon process and timeframe needs to be set for troubleshooting before bill is actually sent to customer. (Marilyn Ferrara) ESP/UDC/Dual	02/02/00	Billing			02/02/00 This is a meter reading to data input billing issue. Examples include the CA model – MADEN Meter and Data Exception Notice. Could be impacted by VEE rule differences, etc. 02/24/00 (New West Energy - Janie Mollon) is preparing a suggested model for Arizona to report billing and metering exceptions. Janie will send out proposal and suggestions. Action: Review and send comments to Janie (recommendation, timeline, with your proposed modification.) Janie will compile for next meeting. 03/08/00 Billing Subcommittee agreed that an exception process such as the MADEN is needed for handling exceptions. MADEN process will be submitted to Policy Subcommittee for standardization across all subcommittee exception process. All committee members should review document in its entirety and be prepared to discuss implementation issues. (APS - Stacy Aguayo) will check with CA UDCs to see if more MADEN information is available.	1	Resv

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						Action: UDCs need to re-evaluate the time frame of estimation. Is there any flexibility before estimating? What notifications should/are in place for notifying MRSPs of missing data? 03/22/00 Take BEN proposal to our companies and discuss possibility of implementing this notification process. Be prepared to talk about possible implementation guidelines. 04/06/00 Action: UDC's need to determine how many days after read due date will ESP/MRSP be notified of missing data and how many days does MSP have to get data after notification before UDC estimates? Action: If MRSP estimates their reads and the estimates cause an exception to produce, can UDC estimate on an estimate? Action: UDC"s check "tolerance" level of their VEE rules. 05/24/00 Estimation process for APS and TEP are outlined in BEN (Billing Exception Notice – see ACC report). VEE tolerance levels to be discussed in newly formed VEE Subcommittee. 06/22/00 Some changes were recommended to BEN process. 10/12/00 BEN has been developed as an interim comm mech until state MADEN (or equiv) is developed. Approved in 6/00 report		
27	Companies are defining 'workdays' for time frames for work to be completed. Some companies are including holidays that are not recognized by others. Need to define 'standardized workday'. (PSWG – Billing) Suggestion: NERC holidays recognized but modified. If a	01/26/00	Policy		02/29/00	In some territories Columbus Day, MLK Day are recognized as holidays and are excluded from a workday calculation. This could affect time periods defined for metering, meter reading, Consolidated billing and enrollment. 02/01/00 – Standardization of holidays may not be possible. (Suggestion 1) If Federal or State Holidays are defined, these could be used as an exception to workdays for ALL participants. (Suggestion 2) Use NERC definition of holiday. Evelyn Dryer to provide to the Policy Group.		Resv

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	NERC holiday falls on a Saturday it is recognized on a Friday and if the holiday falls on a Sunday it is recognized on a Monday. Standardized Work Days: Any day except Saturday/ Sunday or NERC holiday. If holiday falls on a Saturday it is recognized on a Friday. If the holiday falls on a Sunday, it is recognized on a Monday.					Action due 02/15/00: All participants need to take these suggestions to their organizations to see what will work. Items to consider: Cash flow, bill cycles, read cycles, settlement etc. Also, bring a list of your organizations recognized holidays Be prepared to discuss impact to company's if we recommend NERC holidays only, OR if we were to recognize all State and Federal Holidays. (Darrell Pichoff) to bring list of Postal/ Federal Holidays. (Steve Olea) to bring list of State Holidays. 02/16/00 – Pending Resolution (see UDC holiday matrix – enclose with minutes).		
28	Clarification on when UDC can be an MSP. Both sets of Direct Access rules have different definitions. (ACC Rules and HB 2663) (PSWG – DASR)	01/26/00	Policy		see Issue 36 & 56	Example, in APS territory they cannot be an MSP for any customer except under 20 kW and residential customer. Additionally, when are meter exchanges required within the service territories? 02/01/00 In service territory's governed by ACC Competition Rules (R14-2-1615-B), on January 1, 2001 no affected utility can offer competitive services. What if there are no service providers offering these services at a competitive rate after 01/01/01 that make it cost effective for customers to switch? This is a Commission and Legislative issue. (APSES-Barbara Klemstine) Will provide a proposal to group next week showing why the UDC can be an MSP. Action: take Barbara's "white pages" to our companies to see if any problems/issues with the document. Be prepared to discuss next week. May need to create a waiver for this. Action: APS to determine implementation issues regarding issues #28, #36, & #56	1	Resv

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						Barry Scott does not want a rule written that choice of MSP has to be chosen by ESP. It should be the customer's choice. There is still issue remaining which will be included on ACC report. 2/07/01A joint waiver was filed and approved to allow UDCs to provide MSP/MRSP services to comm LP cust		
29	Are 997s required for all transactions? Is that going to be our recommendation for the Arizona standards? (PSWG – Remittance)	01/27/00	Policy	02/08/00		EDI 997s are an industry standard transaction (EDI syntax validation) 02/01/00 Yes, a 997 acknowledgement is required on all standardized EDI transaction sets. Policy group will recommend the level of acknowledgement should be determined by the individual trading partners. 02/08/00 Is a 997 required for meter data that is extracted from a MRSP web site? 2/07/01 – the group agreed that this has been resolved	3	Resv
32	What are true costs of CT/VT (PT) if an ESP wants to buy the equipment? Cost to replace equipment at today's market price OR cost to UDC and depreciated by years since installation. (PSWG – Metering)	01/27/00	Policy		see Issue 44 & 54	Issues 32, 44, & 54 – (SRP - Renee Castillo) will have more information regarding these items for the 03/08/00 meeting. 03/07/00 (ref: 32, 44 & 54) Suggestions: lease CT/PT/VT's or have a long- term purchase plan. APSES-Jim Wonter will contact California to see how they handle CT PT ownership issues. <u>Action</u>: UDC's discuss w/ companies lease agreements, long term payment plans and their defense on why want to own them. <u>Action:</u> Clarify rule 14-2-1612-K10. <u>Action:</u> All market participants review rule 14-2-1612-K10. Determine if we want to interpret/re-word using UDC shall own, UDC shall not own, may own or may own at discretion of the customer. Be prepared to defend/come to a consensus.	1	Resv

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						03/14/00 Costs range from roughly $230-$3500. Action: ESP's to provide more detail regarding long-term payment plan (how much/how long). APS/TEP will not support a leasing option APS will support the payment plan option only if for the life of the contract between the ESP & customer. 03/22/00 ESP's don't want to resort to a lease/payment plan option until issue of UDCs maintaining ownership of CT/PT's has been resolved. 05/09/00 (TEP) Per Position document issued by Tony Gilooly, they are still working on costs. (APS) Installed equipment, material and labor, depreciated by 5 years. (SRP) in process of developing IT equipment costs for full metering competition scheduled for 12/31/00. (Mohave and Navopche) Would support selling at Fair market cost to replace equipment. (Sulfer Srpings) Current Book Value minus depreciation. 2/07/01 The group agreed this is resolved – a standard is not possible		
33	For access to a meter, some UDCs require ESP to get keys, combos, etc. from customer. In many cases, the customer does not have a key.	01/27/00	Metering		06/22/00	02/03/00 APS is not going to provide keys to MSP. They would like the MSP to get key from customer. MSP and MRSP issues: Customers may not have keys. Utility keys may not be able to be duplicated. Or utilities may want to offer a dual locking device on a contractual basis with utilities and MSPs. New West Energy – This is a barrier to getting access to change meters for customers to go DA. Suggestion - If customer is releasing their customer data (historical) anyhow, could key process be incorporated in release? Action: All Utilities need to research what their key policy is and report to subcommittee by 02/16/00. Janie Mollon will bring CA		Resv

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						access process. (Schlumberger - Jamie) In case of customer's lock, they are cutting lock and supplying a new lock to customer. Customer responsible for getting a key to UDC for access to site. (Marv Buck – CUBR) suggesting UDCs change customer supplied locks with UDC supplied locks. Then UDC retains possession of master key and can supply slave keys to customer for them to get to MSP and ESP. Proposal: For customer supplied locks, MSP will cut the lock, if applicable, and supply customer with a new lock and keys. Customer's responsibility to get new key to UDC. MSP will communicate access changes back to UDC on the MIRN form in remarks section. (Citizens Utilities) UDC requires access to metering equip on customers premises for safety reasons and already have keys that were supplied to the customer. ESP should be responsible for supplying UDC with a key to any lock changed on the customer's metering form. It is not reasonable to require customer to produce another key for UDC. 05/18/00 Phaser (Janet Henry) CA gives MSP keys to their locks and lockboxes. – A question was asked "who is responsible/liable during the time MSP cuts UDC lock and the time UDC gets back out there to replace their lock?" Solution: UDCs provide MSPs with padlocks to seal UDC side of locking device. <u>Action</u>: (due 06/21) UDCs determine if they can give a supply of UDC locks to MSPs operating in their territory. 06/21/00 Proposal: For customer supplied locks, MSP will cut lock, if applicable, and supply customer with a new lock and keys. MSP will place a dual hasp on customer's lock and then seal up the other hole on hasp. This will be indicated on MIRN form for UDC to replace the seal with UDC lock. If MSP cuts UDC lock, they will replace it with a dual hasp with a new customer lock and a seal where UDC lock will be		

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						placed. This will be noted on MIRN form and UDC will replace the seal in their normal course of business. 06/22/00 Resolution: For customer supplied locks, MSP will cut the lock, if applicable, and supply customer with a new lock and keys. Customer's responsibility to get new key to UDC. MSP will communicate access changes back to UDC on the MIRN form in remarks section.		
36	ACC Rules Question: Can UDC provide metering and installation services for DA customer? Short term and after January 1, 2001? (PSWG –Metering)	01/27/00	Policy		see Issue 28 & 56	Action: Participants need to read the ACC and HB2663 and be prepared to discuss issue. 2/07/01 The group agreed this is resolved – Joint waiver approved to provide these services	1	Resv
37	Load research meters- Are UDCs intending have a dual meter installed or are they going to pick another sample customer when the customer goes DA? Will UDCs allow ESPs to use existing phone line to read meter for DA purposes? Or vice versa - can UDC use ESP phone lines?	01/27/00	Metering	05/18/00		02/03/00 Action (due 012/16/00): Utilities to document and report what the process will be for handling Load Research meter. 02/16/00 (SRP) will choose new sample. In most cases, phone line owned by the customer. (APS) will choose new sample. In a few cases, they will remove their existing phone line. 04/27/00 Refer to UDC Business Rule Comparison document for UDC requirements or state standard (to be included with PSWG report to the Commission.)	1	Resv
39	Do DA meters installed have to have a visual display? This limits equipment types that can be installed.	01/27/00	Metering			02/03/00 TR Recorder does not have a display. Requirement came from a EUSERC. Action: Utilities need to report on their needs for display by 02/16/00. (APS – Jeanine) will check the EUSERC requirements. ESPs will report on what impacts this requirement could have in their organizations. According to ANSI, a display is not 'required'. Further discussion needed. Metering boxes are the way technology is moving, therefore no	1	Resv

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						display. This may be a customer issue. Utilities to report on why a display is needed. Darrel Pichoff to check with RUCO to see if there's a requirement. 03/02/00 (Prem Bahl – RUCO) RUCO's position is there must be a visual display on all electric meters for residential consumers. Consumer must be able to read the kWh and kW readings. RUCO will insist on this. (K.R. Saline) represents 24 Irrigation Districts, Electrical Districts, and Municipalities. KRS will insist on visual displays on electric meters for both residential and commercial customers. 04/27/00 To be addressed in an upcoming meeting since this issue is currently happening in production today. 10/11/00 updated status as resolved – completed in a previous meeting. The Current Rules require visual displays		
40	What are UDC processes for scheduling MSP work? What if an MSP picks a date to remove and install a meter and schedule must be changed? How are these exceptions handled?	01/27/00	Metering		04/27/00	02/3/00 May be addressed when we start to review the data elements. Utilities must be able to speak to schedules on metering. 04/27/00 MDCR and procedures address this issue. Refer to UDC Business Rule Comparison document. <u>RESOLUTION</u>: (Agreed upon business rule): Initial MDCR Form and EPA (if applicable) must be returned at least five (5) workdays prior to the exchange. These documents will be in Excel and sent via email. Notification of changes to the schedule, including rescheduling and unscheduling, must be sent to UDC by 2:00pm (Arizona time) one (1) workday prior to scheduled work date. UDC will communicate any exceptions to MSP within two (2) workdays of the receipt.	1	Resv
43	Is there a regulatory requirement for UDCs to collect and remit charitable contributions to social agencies.	02/02/00	Billing		see Issue 16	There is potential for state funds to be reduced because there potentially is no requirement to continue these programs. 10/26/00 waiting to hear from NEC to see if they have a requirement to remit. (John Wallace/Darrel Pichoff to follow-up)	3	Resv

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	And is there any regulatory requirement for ESP's to participate in collecting or remitting charitable contributions on behalf of UDC. ESP					2/07/01 There is nothing in the rules requiring the ESPs to contribute but there can be a requirement for UDCs depending on rate cases		
44	Clarify ownership of CT and VTs (PT) based on voltage level. (PSWG – Metering)	02/03/00	Policy		see issue 32 & 54	02/03/00 Will refer to ACC Rules 05/09/00 Clarification of ownership completed - Refer to Business Rule Comparison document from Metering Systems and Meter Reading Subcommittee group. 09/01/00– Refer to Business Rule Comparison document from Metering Systems and Meter Reading Subcommittee group.	1	Resv
45	Standardized data content, data format and data transmission needed for Metering Data.	02/03/00	Metering		04/27/00	Fax and email are not acceptable forms of data transmission. Trading Partners are not able to populate their databases. 04/27/00 Subgroup has standardized the data content, data format and a basic transmission method (email with Excel spreadsheet). Additional electronic methods will be explored.		Resv
46	All Arizona EDI (DASRs, 867, 810, 650) should utilize GMT for business transactions and local time for the enveloping. To avoid problems and unnecessary costs to conform to national standardization in the future, standard time references should be implemented	01/25/00	Policy		04/25/00	This change would help market participants, particularly MDMAs/MRSPs, to save costs by not having to adapt their systems to Arizona's unique requirements. Action: All participants need to see what the use of GMT will do to their systems. 02/16/00 Proposal: All participants will use GMT format for all transactions that require a time stamp. Action: Find out how long the conversion to the GMT format will take. Consensus was reached.		Resv

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
	immediately by each UDC and EDI mapping can be phased in. (APSES)					Proposal: All Arizona EDI transaction set data content will utilize GMT time and GMT time code. The enveloping of EDI transactions will utilize the sender's local time. Implementation Issue: This recommendation refers to the ACC rule that states data transmission will be sent in Arizona time. Policy Group will recommend a change to the ACC Rules. 03/28/00 Determined this is not a rule change, it is actually noted in the CC&N's. Action: Paul will talk with ACC to determine what needs to take place to get issue resolved. Can staff just send a notice to existing certified entities advising them of the change to GMT? 04/25/00 Need to review new proposition. Be prepared to make your company's final decision. GMT was adopted. The original proposal above was adopted. A letter to the Utility Director will be sent by the PSWG.		
48	For all Billing and Metering data, UDCs should employ same rule and/or formula for rounding up data and rounding in calculations. Business process should be implemented immediately by each UDC. Include related changes or impacts to other processes or procedures. (APSES)	01/25/00	Policy		02/29/00	In order to develop a viable direct access market, the burdens and costs caused by differences in data and billing procedures among UDCs will be removed. Customer confusion will be reduced. Action: All participants need to investigate what their rounding processes are on meter reading and billing. They also need to investigate how their CIS/MDMA systems handle rounding. 02/16/00 Jim will provide more examples to help define the issue. 02/22/00 Jim brought examples of rounding issues and found issues were not widespread and magnitude is fairly small. These issues will be discussed with individual UDCs. Pending resolution at 02/29/00 meeting.	1	Resv

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
						02/29/00 No standardization needed.		
53	Blackout period for Direct Access meter exchanges is too long and not consistent between UDCs. (APSES)	01/25/00	Metering			Currently, the three largest UDCs require meters needing to be changed for Direct Access service cannot be changed for a period of time around the current meter's read date. The length of time varies by UDC, but extends up to approximately nine (9) working days for one UDC. This requirement is problematic for ESPs and MSPs because it allows meters to be exchanged during only half of the month for each account (9 working days equates to approximately half of a calendar month). When a customer has multiple accounts on multiple read cycles that all require meter exchanges, MSP must plan their installation schedule around UDC blackout period. This makes it virtually impossible to exchange multiple meters on consecutive days during the month. Since most certified MSPs are installing meters with out-of-state personnel, this requirement adds to the cost of meter exchanges for MSPs and ultimately for ESPs and customers. Proposal: Metering subcommittee should examine process for meter exchanges and shorten or eliminate blackout period requirement. Subcommittee should look at best practices in other states where blackout periods have been eliminated or greatly reduced to foster a more efficient competitive market. Where possible, blackout periods should be consistent across UDCs in the state. Sugggestion: (New West Energy - Janie Mollon) To switch customer , MSP could not install a meter five (5) workdays before a read date or two (2) workdays after a read date. The actual switch happens on the read date. 03/16/00 (APSES - Jim Wontor) brought another proposal. Eliminate blackout periods and allow customer's to switch on exchange date. <u>Action</u>: ESPs will consolidate their proposals for a best practice suggestion on 03/30/00.	1	Resv

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
						04/27/00 Refer to ESP Hybrid proposal addressing switch dates and blackout windows. Also, see UDC Response to Provider Hybrid Proposal. Consensus was not reached between TEP, SRP and APS. APS operates currently without a blackout window even though their Schedule 10 allows for a blackout window. SRP does not operate without a blackout window. TEP operates with a 5 workday blackout window. <u>Action</u>: APS need to find out how long they are willing to work without for 6 mos. a blackout window. TEP will check with their staff to see if they will work with the 5 workday blackout window and then reevaluate in 6 mos. (Navopache - Dennis Hughes) would agree to work with the 5 workday blackout window with the agreement to reevaluate any market impacts after 6 months. (Trico – Anne Cobb) They certainly see advantages to having a blackout period. They would agree to work with the blackout window with the agreement to reevaluate any market impacts after 6 months. 10/11/00 – Resolution refer to UDC Business Rule doc for UDC requirements		
54	Ownership of Current Transformers (CTs) and Voltage Transformers (VTs formerly known as PTs) is not consistent across UDCs. (APSES)	01/25/00	Metering	09/18/00	see Issue 32 & 44	ACC rules for Direct Access and the Electric Competition Act provide for UDC to own and maintain both CTs and VTs. However, interpretation of these rules differs by UDC. One UDC mandates that CT/VTs be purchased by Customer or ESP/MSP if they are below a certain voltage size. Another UDC maintains ownership and maintenance responsibilities of CT/VTs for all customers. And the third major UDC maintains ownership of CT/VTs, but requires ESP/MSP to maintain them. This inconsistency creates difficulty for an ESP, especially when	1	Resv

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
						dealing with customers with facilities in more than one service territory. Requiring ESP/MSP or customer to purchase the equipment also adds a potentially significant cost and may be a barrier for many customers who otherwise might seek alternative suppliers. In California, CT/VTs are treated as part of the UDC distribution system and ownership/maintenance responsibilities are retained by UDC. Proposal: Metering Working Group should look at intent of the language in competition rules regarding equipment ownership and make a determination on CT/VT ownership that all UDCs can implement on a consistent basis. 03/14/00 Action: APS/TEP will investigate whether they can agree to own CT/VT's above the secondary voltage level (600 volts or less). This will not require a rule change…it will require a tariff change. Action: APS will determine amount of primary customer accounts. Issue: Can customer own their own CT/PT's? Need clarification of the rules. 05/09/00 (APS) changing their position regarding ownership of CT/PTs. Position statement is: "APS is agreeable to retaining ownership of CT/'sPT's for Direct Access locations providing tariff and operational issues impacted by this change are effectively and equitably resolved. (TEP, Sulfur Springs, Navopache and Mohave) prefer Rules to stay as is regarding CT/PT ownership, however, they are willing to review suggested rule change. (APSES) Recommend rule language change to add "…at discretion of customer" to the end of the first sentence of section R14-2-1612.k section 10. Action Items: Jim Wontor (APSES) will send out proposed language to PSWG participants by 05/10/00. Participants be prepared with their company position on the proposed language to the 05/23/00 meeting.		

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						07/19/00 (APS) handouts re: ownership and pulse overflow discussed. Several Coops support APS new position that UDC own and maintain all CT/PTs. Draft Equipment Authorization Form reviewed. Bulk form may not be necessary with APS change on CT/VT ownership. (APSES) proposed revised language in form. <u>Action</u>: (APS) to revise EPS form and send out for (All members) review prior to next meeting discussion. (TEP) to report plans for ownership where an existing CT/PT goes bad and the ESP/MSP replaces it. 08/16/00 – (TEP) reported they will provide a replacement CT/VT if existing CT/VT is damaged at no charge to competitive provider. Currently, TEP does not provide CT/VT for new installations. TEP will refile their tariff to separate the CT/VT charge from the other metering charges. Upon approval, TEP will provide CT/VT for new installations. *see TEP handout for additional revised CT/VT information. 10/11/00 Resolution See Business Rule Doc for UDC requirements		
56	Non-availability of local alternatives for providing competitively priced metering services. (APSES)	01/25/00	Policy		see Issue 28 & 36	Currently, there are very few Meter Service Providers (MSPs) or Meter Reading Service Providers (MRSPs) that have facilities and personnel in Arizona. Most of the certificated providers are based out-of-state and cannot, by ACC rules, subcontract with non-certificated personnel in the state. This potentially drives up the cost of some services that require personnel to travel to Arizona. Additionally, since UDCs cannot provide competitive metering services beyond the year 2000, most have chosen not to provide a full menu of services during the year 2000. Both of these factors produce situations where the cost of providing competitive metering services are higher than they would be if they were provided by personnel already located in the state. Policy Working Group should recommend that, to stimulate market and cost effective provision of competitive services, the following changes should be made: 1) UDCs should be allowed to provide competitive metering services at	2	Resv

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						a competitive market price, and 2) 2) MSP/MRSPs should be allowed to subcontract for services to qualified personnel, without having to make them employees of the company, as long as the certificated MSP/MRSP is still responsible for the work they perform. 03/14/00 Barb Klemstine will change the wording on the MSP qualifications/ requirements that is attached to the CC&N in regards to item 3. She will include wording so that the MSP & their agents will be held to the same rules. White Paper Results: 1. TEP & APS agree – waiver will be needed 2. TEP & APS don't agree due to procurement & labor issues 3. TEP & APS agree with some clarification of the rules. <u>Action:</u> TEP & APS will begin working on a waiver for white paper issue #1 (non-residential load profile) 04/11/00 Be prepared to discuss item #2 (subcontracting) at next meeting. 05/09/00 Bob Grey will check with DebScott to verify status of this issue. 2/07/01 – waiver approved for UDCs to provided MSP/MRSPs services to comm LP cust – moved subcontracting issue to #105		
58	How will bill inserts be handled for ESP Consolidated billing as it relates to mandated regulatory messages? ESP	02/08/00	Billing			ESPs will not print marketing messages on their bill. In CA, UDCs have to submit their inserts to CPUC for review. If there is marketing language in the inserts, UDCs have to remove the language. ESPs also have an opportunity to review all messages prior to distribution to the customer. <u>Action</u>: Be prepared to discuss this issue. UDC's determine process for removing marketing language from mandatory messages. 04/06/00 (TEP) will strip their marketing messages from the mandated	2	Resv

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						bill messages. (APS) will not be send bill messages electronically 05/24/00 (New West Energy) wants it sent electronically, then they will print message/stuffer with the bill. (TEP) agreed to send insert electronically (email with document attached) and/or post it to their website. (APS) will verify if they can accommodate this proposal. Action: APS to verify if they can create WORD document, not PDF, so ESP can transfer data to the bill. 06/22/00 Agreement needs to be made between ESP and UDC re: how marketing messages will be delivered (web site, e-mail etc.) 10/12/00 Modfied 6/22 Resolution : Agreement needs to be made between ESP and UDC on how mandated regulatory messages will be delivered (web site, e-mail etc.)		
62	If back billing is required for period where the customer is both Standard Offer and DA, for ESP Consolidated Billing, the ESPs will want to bill/pay only the DA period	02/08/00	Billing		see Issue 7	03/22/00 (New West Energy -Janie) to bring California options to next meeting. Action: UDC's to see how can supply intermittent data. 04/06/00 ESP's Proposal: Current bill agent will bill for current charges. Original bill agent will be responsible to bill the re-bill period for which they had relationship with the consumer. Dual Billing will be used as a back-up default when an original ESP is no longer in business or by mutual agreement by all parties involved. 10/26/00 If the customer has gone DA/ESP Consolidated Billing and there is backbilling for the SO account, the UDC will bill/collect the customer directly and not involve the ESP. *Opened issue 96 to expand on related scenarios.*	1	Resv

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63	For ESP Cons Blng, if UDC or ESP charges are not transmitted by the drop dead date/time, what is the responsibility of biller to include language on the bill advising customer of missing charges.	02/08/00	Billing			10/26/00 Most if not all UDCs have language in their op proc for this. Action item: UDC will bring their specific lang to Nov 16 mtng 11/16/00 TEP and APS discussed their requirements. The group agreed that this issue should be handled in the UDC protocols. 2/07/01 Resolution: The resolution is stated in the 11/16 note	3	Resv
64	How many decimal places should be required before applying the multiplier to a demand read? How many decimal places should be required for billing demand? (PSWG – Policy) In 867, when we convert the kW back to a read how many decimal places need to be accommodated? Do we want MRSP to give us usage/multiplier or give us actual read (w/ two decimal places)?	02/16/00	Metering		04/13/00	Action: Can CIS multipliers be changed to "one" since the MRSP is adding in the multiplier to the demand provided in 867. Review 867 guideline to determine if the billing demand posted should have multiplier applied to it. MSP required to apply multiplier to the demand. Action: Utilities need to research when a demand figure is received from an MRSP, what is their process for backing out the multiplier and extracting the read. Considerations: Decimal points accommodated and having different multipliers for demand meters in CIS systems. Action: Check 867 requirements to ensure we are all on the same page. Check for all issues pertaining to the 867 (issue #64, #46, & #65) 03/16/00 What is happening on the MRSP reads? Reads are coming with inconsistent data. Example, some with 1 decimal place, others with up to 4 decimal places. UDCs take demand reads up to 2 decimal places. Any more than 2 decimal places are either truncated or rounded by UDCs in order to bill. This could cause demand calculation to be off from what the other party would be billing. Possible Solution: MRSP can deliver the read rounding to 2 decimal places. Or demand be figured on interval data only. Both ESP and UDC would have to bill off the same value (kW figured on read or interval data) to ensure same billing kW figure.	1	Resv

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						Currently ESPs are not billing on demand. This will become an issue when they decide to start billing the demand. If they were to bill off the demand, they would extract it from the interval data. Although the read would still need to be supplied for VEE. Action: Participants need to go back to their companies to see if they can handle kW reads to 2 decimal places. Are the parties willing to say that this would be the standard. (Citizens Utilities) Their system is not set up to bill multipliers already applied. This will cause manual work on our billing staff and potentially result in billing errors. 04/13/00 Consensus of Metering subcommittee – two (2) decimal places.		
65	Arizona 867requires MRSPs or UDCs to pass billing reads. Is this necessary? Could Interval data only be passed? Then UDC/ESP would be responsible for creating billing reads. Determine if read will be encoded or calculated.	02/17/00	Metering	08/15/00	06/22/00	Confirm it is a requirement to have both begin and end reads. Yes, this is a requirement. 03/16/00 (APS -Joe Webster) They need both the interval and billing reads. This is used for the VEE process. They would need reads off the register (encoded), not calculated reads. (SRP -Greg Carrel) on interval data accounts, they bill off interval data only. Interval data is VEEd on the interval data. (Navapache -Dennis Hughes) They have apx 7,000 interval data accounts. However, they bill off billing reads. (TEP) On very select occasions, they will bill off IDR data. However, they validate on billing reads. Action: A small subcommittee will review possible solutions to this issue: Marv Buck, Janie Mollon, Tim Jones, Kimane Aycock, Joe Webster, Darrell Shear, Greg Carrel, and reps from TEP. They will report back to Metering Subcommittee on 04/13/00. 04/27/00 Refer to UDC/ESP Proposal. (Citizens Utilities) sent comments		Resv

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						their company does not support this proposal. Dennis Hughes reported that (AEPCO) does not support this proposal. Subgroup took a vote to bring issue to full PSWG meeting and only 2/3 majority was reached. Further discussion needed. Renee Castillo and Marv Buck will develop memo to be sent out to full PSWG. Will set aside 1 hour of discussion to take place immediately after PSWG meeting on 05/03/00. All market participants are encouraged to attend the discussion. 05/31/00 Proposal: Barry Scott presented unified Coop proposal for distribution metering. Citizens agreed with the counter proposal. Coops and Citizens prefer registered reads, but would take calculated reads if ACC staff would agree that calculated reads are treated as registered reads. Implemented for one (1) year from first DA customer in each respective territory, and issue of taking raw interval data reads then being revisited. 06/22/00 RESOLUTION: Commission Staff agreed to 05/31/00 proposal. 07/19/00 (APS) provided handout of implementation issues/ process at subcommittee meeting. Action: (APS) to report on its implementation date. 07/20/00 Missing intervals and zero intervals referred to next VEE session. 2/07		
66	How are UDCs identifying master meter and showing subsequent sub-meters? Is there a common way to identify meters with same address with multiple meters? Currently UDC issues one MI	02/17/00	Metering		04/27/00	Action: Identify how UDCs are handing totalized metering and sites with multiple meters. 04/27/00 Number of meters is Identified on the new EMI forms.	3	Resv

#	Issue	Date Identified	Sub-Committee	Date Needed	Date Resolved	Discussion	Priority	Status
	form per meter.							
67	#1 If a master metered account goes DA, does ESP lose grandfathered agreements to continue with master metering? #2 If a master metered account is DA and an individual customer within the master metered property wants to return to Bundles Service, will the UDCs allow that individual customer to come back or vice versa	02/17/00	Metering	09/18/00		Action: for UDCs to research. Dave Rumolo will research FERC requirements. 04/27/00 Dennis Hughes to follow up with Dave to verify status is of this issue. 07/19/99 Most members agreed master metered accounts have right to go DA. (Phaser) noted this is not a problem in California. Action: (TEP) will review its position and comment at Aug meeting. 08/16/00 (TEP) Q1 -TEP will allow a master metered account to return to Bundled Service from DA as long as the property meets requirements and tariff is active. (See TEP position papers from 8/16/00 meeting) Q2 - TEP will allow individual customer to stay Standard Offer while master metered account goes DA (or vice versa). In this case, metering point must be upgraded to meet all of TEP regulations and service requirements to handle it as a single dwelling. This will require new underground or overheard service lines and an approved pedestal or meter socket at the customer's expense. (APS) Q1- No, customer does not lose master metering when returning to Standard Offer. Q2 - APS to report back with information at Sep meeting. (Navopache) Q1 - No, customer does not lose master metering when returning to Standard Offer. Q2 - Navopache to report back with information at Sep meeting. (Sulfur Springs Electric Cooperative) Q1 - Sulfur Springs to report back with information at Sep meeting. Q2 - Sulfur Springs to report back with information at Sep meeting. (Trico) Q1 Trico to report back with information at Sep meeting. Q2 - Trico to report back with information at Sep meeting 10/11/00 –resolved at a previous meeting (see minutes) or contact UDC for requirements	3	Resv
68	Site Meets – What are UDC	02/17/00	Metering			Add to Business Rule Document.	1	Resv

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	policies?					04/27/00 UDC policies and procedures have been added to the Business Rule Comparison Document.		
72	How are adjustments going to be handled in the 810.	02/24/00	Billing		see Issue 7	How will we communicate reason for Misc. adjustments. 04/06/00 UDC's to come up with list of various adjustments made on a bill and be prepared to discuss at the next meeting. 05/24/00 Revisions compiled for implementation guides of BEN and Rebate/ Rebill notification processes. 10/12/00 Resolved: 810 Guideline covers this	1	Resv
73	Is NERC using Standard Central Time in Non-EDI transactions? Why is NERC using Standard Central Time and should we be using it?	02/29/00	Policy			03/07/00 Address once NERC has made their decision on which standard time to use. Suggestion: Send a letter to NERC recommending GMT. Action: Talk w/ your companies re: support of the GMT format (issue #46) as a standard so can file for a joint waiver. E-mail to Evelyn by 03/13/00. Evelyn will write the waiver to present to the ACC. Yes, NERC is using Central Standard Time. 03/28/00 Action: Shirley & Jim will flow out process' for converting data to Standard Time Zones. 06/22/00 Priority set at 1. 2/07/01 Resolved – this was include in the Rule tweaking package in 2000	1	Resv
74	Navapache will be submitting a report to PSWG regarding what their business processes will be for DA. (PSWG – Metering)	03/02/00	Policy			How should this report be represented in the 06/15/00 ACC report? This opportunity may need to be offered to all cooperatives. 04/25/00 Dan Laos - this issue became a cooperative response. Executive summary has been submitted to the Policy Subcommittee. 2/07/01 – information was included in 2000 report	1	Resv

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77	UMI was presumed to be national standard for identifying a single meter. It's not being used by any other state in dereg market. Most EDI documents are not implementing a UMI number. (PSWG – Metering)	03/16/00	Policy		03/28/00	Representatives from New West Energy, APSES, 1st Point and Schlumberger are not using this number. It was suggested that this number not be implemented as an Arizona standard. 03/28/00 APSES does not need the UMI. Jim Wontor advises the UMI is not being used by MSP's (First Point & Schlumberger) in CA. This is not an industry standard that we thought it would be. No compelling reason for market participants to use the UMI standard. Proposal: Request Utilities Director remove requirement of using UMI standard from 05/01/99 report.	1	Resv
79	Explore additional electronic methods for transmitting metering data.	04/27/00	Metering			06/22/00 Reassigned from Policy to Metering. 11/29/00 – The group has developed a standard process for exchanging data (EMI, MDCR & MIRN) in excel format via e-mail. Until there is a need to look at other methods to communicate, this will be the standard for these forms. 2/07/01 – resolved 11/29/99	3	Resv
82	How are non-metered services going to be handled? What are the charges going to be? Who is responsible to maintain/bill for the services?	05/24/00	Billing			06/22/00 Assigned to Billing. Action: Each entity be prepared to discuss issue in July subcommittee meeting. 07/20/00 Participants concluded a separate bill for dusk-to-dawn lights or security systems does not make sense for a non-metered account customer. Members recognized 810 standard will not address non-metered accounts or non-energy related charges unless UDC and ESP agree to include such charges on an ESP consolidated bill. 10/12/00 Proposed 810 addresses the billing of non-metered services. If the non metered stays SO and the metered goes DA, the customer will get a separate bill for the SO un-met serv from UDC.		Resv

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86	Standardization of application of long-term contracts on Standard Offer Tariffs	07/20/00	Policy			This issues refers to R14 1606 C6 which states *After Jan 2,2001, tariffs for Standard Offer Service shall not include any special discounts or contract with terms or any tariff which prevents the customer from accessing a competitive option, other than time-of-use rates, interruptible rates, or self generation deferral rates.* 11-01-00 Barbara Klemstine clarified the issue and requested Staff to confirm the interpretation of this section. Additionally, UDCs are to come back to the Dec mtng with any rate restrictions when a customer comes back to SO.		Resv
88	Can an existing Standard Offer customer own their meter? And can a DA customer coming back to SO who owns their meter, retain ownership?	08/00/00	Policy			Many UDCs require the DA meter to be removed and a UDC meter installed when a customer returns to Stndrd Ofr. 10/05/00 Staff will look into the issue 10/11/00 APSES and CUC provided their position papers for discussion. Staff will advise if the rules allow Standard Offer customers to own meters at the November 1st Policy meeting. 11/1/00 Staff confirmed that Standard Offer Cust can not own their own meter. Deb Scott confirmed that a waiver/rule change will be required– Next steps will be for all participants to draft position papers identifying why they support or why they do not support. 12-4-00 The group agrees that this issue is not clearly stated. Some companies interpreted this to include ownership and maintenance and others did not. Issue 100 was added. 2/07/01 Resolved on 11/1/00		Resv
91	How many decimal places should be visually displayed for kW on the meter?	08/00/00	Metering			10/11/00 – same as issue # 64 10/25/00 – re-opened since this issue involves the display and 64 deals with the billing of demand. 11/15/00 – After further discussion it was decided that is wasn't an issue since visual demand display is not used for billing purposes – Issue Resolved		Resv

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93	Where will documents be published and how will the Maintenance be handled?	10/12/00	Policy			2/07/01 – documents will be approved by the Utilities director and posted to the ACC website.		Resv
96	If backbilling is required for a period when as customer was served by and ESP and is not longer with that ESP, who is responsible for billing and collecting?	10/26/00	Billing			10/26/00 Copied discussion frm 04/06/00 ESP's Proposal: Current bill agent will bill for current charges. Original bill agent will be responsible to bill the re-bill period for which they had relationship with the consumer. Dual Billing will be used as a back-up default when an original ESP is no longer in business or by mutual agreement by all parties involved. 10/26/00 Action Item: Participants to come back w/positions on how this should handle (hold EPS responsible, bill cust directly, etc) Consider credit bal refunds also. 11/16/00 APS presented a proposal on how to handle back billing. The group supported this proposal. See attachment to 11/16/00 minutes 2/07/01 – Resolved at the 11/16/00 meeting	1	Resv