Request IR-1:

Please provide the detailed requirements and scope documents (p. 2).

Response IR-1

Please refer to Attachments 1, and 2, which include documents that provide information related to the detailed requirements and scoping gathering exercises.

Nova Scotia POWER
An Emera Company

Summary	
	Renewable to Retail
Project End Date	
Project Description	
Total Requirements	75
Requirements Not Started	0
Requirements in Progress	4
Requirements Completed	71
Project Manager	

Requirement Details								
ID	RTR Impl. Guide Section	Requirement Type	Initial Requirement	Refined Requirement	Area of Impact	Categorized	Business Area Impacts	Supporting Technology
8	2.1	Set Up	Distribution Tariff Billing	The Distribution Tariff must be recorded against the LRS customer in CIS as 'misc. charges'. However, a bill must not be sent to the customer directly. NSP will recover the distribution costs via an aggregated bill to the LRS	Load Revenue	LRS Settlement, Billing, and Invoicing	Customer Care Load Revenue Project Team	MDM MV90 CIS SFTP (for transfer)
9	2.1	Set Up	Payments from LRS	The general ledger accounts associated with the RTR market will be setup in both Oracle and CIS (revenue codes) as specified by Load & Revenue. Finance will create the new accounts codes as well as propose a set of 'old' account numbers to satisfy CIS requirements on an old system. A translation table is maintained by finance to maintain the relationship in these account codes The 'old' codes are communicated to CIS where they are created in that system and associated with CIS revenue codes	Load Revenue	LRS Settlement, Billing, and Invoicing	Customer Care Load Revenue LRS	CIS
10	2.3	Set Up	Metering Reading	AMI meters will be used unless otherwise deemed not useable. In the event that a premise cannot use an AMI meter,then a MV90 meter will be used.	Load Revenue SMOC Project Team	Metering & Load Calculations	Load Revenue SMOC	MDM MV90
11	2.3	Set Up	Metering Data Management/Reporting	A report will be developed to produce the interval & peak meter data associated with all LRS customers and LRS generators. The expected final format will be Tableau.	Load Revenue SMOC Project Team	Metering & Load Calculations	Customer Care Load Revenue SMOC	MDM
13	2.4	Set Up	Invoice design / layout	An unofficial invoice will be sent to the LRS from the load & revenue team for the LRS tariffs (EBS, RTT, STT, OATT) within the first few days of the new month as part of the month end process in an excel format. This will not include the distribution tariff portion. The official invoices will be sent to the LRS by the billing team as two bills. 1. Distribution Tariff Charges Bill generated on the first of the month as a group billing consolidating all DT charges by LRS 2. LRS Tariff Charges Bill (EBS, RTT, STT, OATT) within the first several days of the month following the month end process The two bills can be communicated the day they are generated or can wait and be consolidated to one submission to the LRS as agreed upon with the LRS	Load Revenue/CIS SMOC	LRS Settlement, Billing, and Invoicing	Customer Care Load Revenue Project Team	CIS

14	2.5	Set Up	Meter Data Aggregation on the Load side	Interval meter data from LRS customer load will be aggregated for use in calculation of Tariffs. Aggregation will take place as per direction of the Implementation guide section 2.5	Load Revenue SMOC Project Team	Metering & Load Calculations	Load Revenue Project Team SMOC	MDM
15	2.5	Set Up	Meter Data Aggregation on the Generation side	Interval meter data from LRS generation will be aggregated for use in calculation of Tariffs. Aggregation will take place as per direction of the Implementation guide section 2.5	Load Revenue SMOC Project Team	Metering & Load Calculations	Load Revenue Project Team SMOC	MDM
17	3.1.3	Set Up	Loss Factor Calculation	Locational Loss Factors can be found on OASIS and are to be used in the calculation of the EBS and OATT tariff calculations	Control Centre (Sys. Security) Regulatory Load Revenue SMOC	Tariff	Load Revenue Project Team	MDM
18	3.1.4	Set Up	EBS Billing	The calculated EBS Tariff quantities will be multiplied by the relevant rates, reviewed by the Load and Revenue team and included in the aggregated bill to the LRS.	Load Revenue SMOC Customer Billing	Tariff	Load Revenue	MDM CIS
20	3.2.2	Set Up	Standby Service Billing	The calculated Standby Tariff quantities will be multiplied by the relevant rates, reviewed by the Load and Revenue team and included in the aggregated bill to the LRS.	Load Revenue SMOC Customer Billing	Tariff	Load Revenue	MDM CIS
22.1	3.2.3		Generation Planning will need to provide capacity contribution factor for each of the LRS' generators - see section 3.2.3, step 8 in the guide.	The capacity contribution factors will be retrieved from the 10 year system outlook report		Tariff	Load Revenue Project Team	MDM Gen Planning Tool?
23	3.3.1	Set Up	Transition Tariff (RTT) Billing	The calculated RTT Tariff quantities will be multiplied by the relevant rates, reviewed by the Load and Revenue team and included in the aggregated bill to the LRS.	Load Revenue SMOC	Tariff	Load Revenue	MDM
26	3.4.3	Set Up	Process and Tool Set Up to Capture LRS' Generation Forecast for OATT Billing	LRS Generation forecasts to be delivered to NSPI via the secure SFTP side on a monthly basis.	Load Revenue Control Centre	Tariff	Load Revenue LRS Project Team	
27	3.4.3	Set Up	Process to Obtain Monthly Average System Marginal Cost (On-Peak and Off-Peak) for OATT Billing	Load & Revenue receive the marginal cost file on a monthly basis from Fuel via a SharePoint site. The marginal cost will be calculated from this spreadsheet to calculate the tariffs	Regulatory	Tariff	Load Revenue Project Team	
29	3.5.2	Set Up	Distribution Tariff Quantities	Any additional costs incurred by NSP at the customer level will be included on the customer account as a miscellaneous charge. All miscellaneous charges will be captured and included in the distribution tariff for that customer and aggregated and billed to the LRS. This work will be scheduled and completed following current processes.	Load Revenue/CIS SMOC	Tariff	Load Revenue Project Team SMOC	AMI/MV90 CIS

30	4	Set Up	Settlement, Billing, Invoicing & Dispute	LRS billing inquires and LRS Customer billing will first be sent to the RTR project team. The RTR project team will communicate those billing inquiries to the Customer Care team for which customer care will redirect that query to the required party to resolve the issue. Once resolved, the RTR project team will communicate the resolution to the LRS.	Load Revenue/CIS (Aaron MacLean billing)	LRS Settlement, Billing, and Invoicing	Customer Care Load Revenue	
33	5.2.5	Set Up	Credit Assurance	The LRS is required to provide credit assurance on a monthly basis to an amount equal to 200 percent of the payment for the LRS Tariffed Services the DT charges, and customer service work charges combined rounded to the nearest 1000 dollars	Customer Care	Regulatory/Compliance/Reporting	Customer Care LRS Regulatory	CIS
34	6	Set Up	RtR Customer Transactions	LRS and NSPI must have a mechanism for communication to facilitate the type of customer transactions as described in the Implementation guide TCC - Transfer current NSPI Customer to become an RtR customer of the LRS TNC - Enroll a customer that is not an NSPI customer as an RtR customer of the LRS RLC - Return a current LRS' Customer to NSPI's service TLC - Transfer an LRS' Customer to an alternate LRS CIR - Customer Information Request from NS Power by an LRS CIU - RtR Customer Information Update to NS Power by an LRS OTH - Other service types - Describe: The LRS will be required to complete the RCTRA form and submit via the secure RCTRA site setup by NSP. Any form of data and/or document transfer will occur via this secure site.	Customer Care/Customer Experience	Customer Transactions	Customer Care LRS	CIS
35	6.7	Set Up	RtR Customer Intake	A process and mechanism must be in place to facilitate a customer being setup as an LRS customer (Customer transaction types "TCC", "TNC")	Customer Care/Customer Experience	Customer Transactions	Customer Care LRS	CIS
36	6.7.2	Set Up	Return customer from LRS to NS Power	A process and mechanism must be in place to facilitate the conversion of a LRS customer to a NSPI customer (Customer transaction type "TLC")	Customer Care	Customer Transactions	Customer Care LRS	CIS
38	6.7.4	Set Up	Info Requests	A process and mechanism must be in place to facilitate customer information updates and requests by the LRS (Customer transaction types "CIU", "CIR")	Customer Care	Customer Transactions	Customer Care LRS	CIS

40	4	Set Up	Provincial HST Rebate	The bulk vendor (supplier of electricity) will be have the responsibility to provide the provincial rebate to their customers (the LRS in the case of RtR). NSP will not include the HST rebate in their invoices to the LRS.	Load Revenue/CIS (Aaron MacLean billing)	Regulatory/Compliance/Reporting	Customer Care Load Revenue	CIS
42	3.5	Set Up	Will the Storm Rider described in the 2023 UARB GRA decision be applicable to the Distribution Tariff.	Storm rider charges apply to customers in the RtR market. Storm rider charges will not be charged to customers until the earliest 2025	Load Revenue/CIS (Aaron MacLean billing) Regulatory	LRS Settlement, Billing, and Invoicing	Customer Care Regulatory	CIS
48	6.2	Set Up	Identify where and how to flag customers as LRS customers in MDMS and CIS	LRS customers must be flagged as such and a history of their status' as LRS customers must be maintained	Project Team	Customer Transactions	Customer Care SMOC	
53	2.3	Set Up	Oracle (MDMS) will be the solution for data collection, Meter Reads, Data aggregation storage and related transactional reporting for reconciliation.	MDMS will be the source of truth for meter data collection, meter reads, and data aggregation storage except in the circumstance where an MV90 meter is used. In that case Itron will be the source of truth	Load Revenue SMOC Project Team	Metering & Load Calculations	Load Revenue Project Team SMOC	MDMS
54	2.3	Set Up	Hourly interval data required.	Meter data must be captured on hourly intervals for all RtR customers. If premise location is AMI functional, any customer which decides they want to join an LRS must first acquire an AMI meter before becoming eligible to join the LRS. If not AMI functionable, a MV90 meter should be used.	Load Revenue SMOC Project Team	Metering & Load Calculations	Load Revenue Project Team SMOC	
57	TBD	Set Up	Work to simplify Billing Cut Off and subsequent processes for customer transfers etc.	Billing for customers leaving NSP will receive a final bill as per current process when leaving NSP. A disconnections service order will be created and scheduled to disconnect that customer on the last day of the billing cycle and issue their final bill. A corresponding connection service order will be created and scheduled to connect the new LRS customer account on the first day of their new billing cycle. A CIS process will marry up the corresponding disconnection and connection service orders to complete the transfer	Customer Care	LRS Settlement, Billing, and Invoicing	Billing Customer Care	CIS
58	6.2 & 4	Set Up	CIS is the solution for Rate Class updates, invoicing and Customer intake	CIS is the source of truth for rate classes and distinct rate classes should be built and assigned to LRS customers	Load Revenue/CIS (Aaron MacLean billing)	Customer Transactions	Customer Care	CIS
59	4	Set Up	CIS Billing will be cycle based.	Billing for LRS' will occur on a monthly schedule. If an LRS's application to start with NSP occurs within a month, their first billing cycle will not begin until the start of the next month		LRS Settlement, Billing, and Invoicing	Customer Care Load Revenue	CIS
63	6.2	Set Up	Put all on same cycle 1 of 8 rate codes; meter readings; CIS aggregates Kwh; no receivables in CIS	Rate codes will not be setup in CIS. Tariff amounts will be calculated outside of CIS, have the corresponding rates applied to them, and the calculated charges recorded against the LRS and the LRS customer accounts. Billing will reconcile the receivables in CIS following payment from the LRS manually.		LRS Settlement, Billing, and Invoicing	Customer Care Load Revenue	CIS
68	6	Set Up	CIS SRVM needs to be turned off.	Any RtR LRS customer should never receive a bill from NSP. Any billing to the LRS customer will be captured in the LRS' aggregated bill. Upon LRS customer creation, the LRS customer NSP accounts will be put in 'suspended' status. Accounts in this status will not generate a bill to the customer When executing the LRS and LRS customers billing batch, the batch will be executed in the following configuration to prevent bills being sent to customers: a. Selection enabled b. Print disabled c. Post enabled	Load Revenue/CIS (Aaron MacLean billing)	LRS Settlement, Billing, and Invoicing	Customer Care Load Revenue	CIS
70	6	Set Up	Need to update Customer Type in CIS.	The LRS customers accounts will be setup on a billing class identifying them as LRS customers. The parent customer hierarchy for each LRS customer will be the LRS customer hierarchy level creating a parent child relationship between the LRS and their customers in CIS.		Customer Transactions	Customer Care	CIS

71	4	Set Up	Need to workshop Billing Calculations as they are complex flows to Finance.	Billing determinants will be calculated by two distinct groups: Distribution Tariff by the billing team: The billing team will retrieve the customer meter read from either the MDMS Tableau report or MDMS directly and use the corresponding rate for that customer rate class to calculate the tariff charges. LRS Tariffs (EBS, RTT,STT,OATT) by the load and revenue team: The load and revenue team will retrieve the meter interval data from the MDMS Tableau report and leverage that data in addition to the many other constants associated with the tariffs to calculate the tariff quantities and apply the corresponding rates to them.	Load Revenue/CIS (Aaron MacLean billing)	LRS Settlement, Billing, and Invoicing	Customer Care Load Revenue	
73	4	Set Up	Can use CIS for Lump Sum and Misc. Bills.	The billing determinants will be calculated outside of CIS but the aggregated billing amount must be recorded against the LRS account and the distribution tariff to be recorded against each individual LRS customer	Load Revenue Forecasting	LRS Settlement, Billing, and Invoicing	Customer Care Load Revenue	
75	4	Set Up	Visio #3 Box 15 will also require separate workshop with Glen, Sandy, Lauren and Aaron M. to flesh out details on how to stage the various data sources and collate for invoicing.	A Tableau report will be developed by the SMOC team to display the required interval meter data. The Load & Revenue team will extract the relevant data and input into a tariff calculating spreadsheet with assistance from the RtR Project team.	Load Revenue/CIS (Aaron MacLean billing)/ MDMS	Metering & Load Calculations	Customer Care Load Revenue Project Team SMOC	MDMS
80	6.4	Set Up	Customer Care Intake: Upon acceptance of an RCTRA, NS Power will notify the LRS and record the LRS as the LRS of record for the particular RtR Customer Premises. If an RCTRA is rejected, NS Power will provide the LRS with the reason(s) for the rejection. Visio 1.1 steps 14 and 15	NSPI to communicate with the LRS upon the acceptance or rejection of any customers application to join an LRS. If the application has been rejected, NSPI must provide the reason(s) for rejection	Customer Care/Customer Billing	Customer Transactions	Customer Care LRS	
81	6.6	Set Up	Customer Transfer: 14 Day (Reasonable Effort) SLA for complete the installation of interval metering devices and communications equipment and services needed to transfer of the RtR Customer to LRS supply within fourteen (14) Calendar Days of receipt of the RtR Customer Transaction Request Application. Visio 1.1	NS Power will make reasonable effort to complete any RtR Customer Transaction Request Applications within 14 Days	Customer Care/Customer Billing	Customer Transactions	Customer Care Field Service	
82	6.7	Set Up	Customer Transfer: Following acceptance of the Customer Transaction Request Application by NS Power, the RtR Customer transactions will be effective for the period following the next meter reading for the RtR Customer	Following the acceptance of a new LRS customer, the LRS customer will receive their final NSP bill at the end of the current calendar month. The LRS customer will bet setup for LRS billing at the start of the next month provided the start of the month is at least 5 business days away. If less the 5 business days, the LRS billing will commence on the first day of the next month	Customer Care/Customer Billing	Customer Transactions	Customer Care Load Revenue	
83	6.2	Set Up	Customer Consent: LRS is responsible for obtaining and providing the RtR Customer's written consent, in a form acceptable to NS Power, in support of any transaction requests submitted to NS Power on behalf of the RtR Customer	LRS is responsible for obtaining and providing the RtR customers written consent within the propertly submitted RCTRA form.	Customer Care/Customer Billing	Customer Transactions	LRS	
84	6.2	Set Up	Customer Consent: LRS is responsible for obtaining any consents from the RtR Customer required by NS Power with respect to the use or disclosure of Customer Information	LRS is responsible for obtaining any consents from the RtR customer required by NSPI with respect to disclosure of customer information	Customer Care/Customer Billing	Customer Transactions	LRS	
85	4	Set Up	Investigate ability to implement calendar - month based billing for LRS customers based on 'and your new contract will take effect at the first available opportunity, which could be 30 to 60 or more days later' in the Guide to Purchasing Renewable Low-Impact Electricity in Nova Scotia	Billing for LRS' will occur on a monthly schedule. If an LRS's application to start with NSP occurs within a month, their first billing cycle will not begin until the start of the next month	Customer Care/Customer Billing	LRS Settlement, Billing, and Invoicing	Customer Care Load Revenue	
86	3.5	Set Up	Streetlight charges for customers to proceed to customer via LRS	Streetlight charges will be included in the distribution tariff on the customers records in CIS and aggregated onto the LRS' monthly bill		Tariff	Customer Care Load Revenue	CIS
87	2.5	Set Up	Separate workshop to isolate listing of all customer charges (permit, streetlight, Safe Clearance, Heat Pump Financing etc. and confirm final approach to handling billing.	Fixed and recurring charges associated with a NSP customer transferring to an LRS will be transferred to their new LRS account (such as streetlights). Financing charges will have to be paid before transferring and will be included on the customers final bill (such as heat pumps, energy efficiency retrofitting) LRS customers will also no longer be eligible for credits or donations (such as EV charging credit, heat fund donation, etc.)		LRS Settlement, Billing, and Invoicing	Customer Care	

89	6.7.5	Set Up	Need to understand what if (field services) needs to communicate with an LRS customer who doesn't have up to date info.	It is the responsibility of the LRS to communicate to NSPI any changes in their customer information. If details regarding that customer have changed, the LRS is obligated to communicate that change to NSPI.		Customer Transactions	Customer Care Field Service LRS	
93	3.5	Set Up	If the operational or consumption characteristics of the RtR Customer change, such that the RtR Customer, in NS Power's determination, no longer qualifies for its current rate class, NS Power shall apply a Distribution Tariff rate appropriate to the RtR Customer's new operational or consumption characteristics.	If the operational or consumption characteristics of the RtR Customer change, such that the RtR Customer, in NS Power's determination, no longer qualifies for its current rate class, NS Power shall apply a Distribution Tariff rate appropriate to the RtR Customer's new operational or consumption characteristics.		LRS Settlement, Billing, and Invoicing	Customer Care Load Revenue	
94	TBD	Ops	New NS Power customers (New Build / Construction) must be first onboarded to NS Power during construction phase and can only transition to RtR post construction if desired.	All RtR customers must first be registered as a NSPI customer before submitting a request to join a LRS	CIS	Customer Transactions	Customer Care LRS	CIS
95	6.2	Set Up	Decision - Onboarding customers (RCTRA Processing) and Billing Inquiry calls or emails will all be handled by the new RtR Customer Care Specialist. For phase 1 , those requirements will be triaged by the Project team	The RTR project team will be the first point of contact for RCTRA requests and will coordinate the response of those requests with NSPI		Customer Transactions	Customer Care Project Team	
103	6.2	Set Up	Customers will be flagged as being customers in CIS – still in early stages if trying to determine what field will be used. From an ADMS perspective it looks like these fields passed through the interface today would work: oAccount Type oSite Notes – free form text field, probably not best approach or data integrity and reporting	LRS customers and the LRS entity themselves must be identifiable within CIS. The relationship between the LRS and their customers must be identifiable within CIS and history maintained as the customer changes its status from an LRS to NSP customer and vice versa. Both the LRS and the LRS customers will be assigned a specific billing class identifying them as such	ADMS	Customer Transactions	Customer Care	CIS
106	3.1	Set Up	EBS Tariff calculations and preparation for Invoicing (excluding Administration Charges) will be reviewed by MDMS Team to determine the best approach via the MDM Solution. If MDMS cannot accommodate, this will be reviewed for manual processing by the Load and Revenue Forecasting (Sandy Allen) Team. MDMS team expects to be able to accommodate.	The EBS Tariff quantities will be calculated using the aggregated interval data from MDMS and/or Itron. EBS Tariff will be calculated as per section 3.1.4 of the Implementation guide	MDMS Project Team	Tariff	Load Revenue Project Team SMOC	
107	3.2	Set Up	Standby Service Tariff calculations and preparation for Invoicing (excluding Administration Charges) will be reviewed by MDMS Team to determine the best approach via the MDM Solution. If MDMS cannot accommodate, this will be reviewed for manual processing by the Load and Revenue Forecasting (Sandy Allen) Team. MDMS team expects to be able to accommodate.	The Standby Tariff quantities will be calculated using the aggregated interval data from MDMS and/or Itron. Standby Tariff will be calculated as per section 3.2.3 of the Implementation guide	MDMS Project Team	Tariff	Load Revenue Project Team SMOC	
108	3.3	Set Up	RTT Tariff calculations and preparation for Invoicing (excluding Administration Charges) will be reviewed by MDMS Team to determine the best approach via the MDM Solution. If MDMS cannot accommodate, this will be reviewed for manual processing by the Load and Revenue Forecasting (Sandy Allen) Team. MDMS team expects to be able to accommodate.	The RTT Tariff quantities will be calculated using the LRS Winter Peak Firm Demand (LWPFD) calculated from the Standby Tariff and aggregated interval data from MDMDS and/or Itron. RTT Tariff will be calculated as per section 3.3.3 of the Implementation guide	MDMS Project Team	Tariff	Load Revenue Project Team SMOC	
109	3.4	Set Up	OATT Tariff calculations and preparation for Invoicing (excluding Administration Charges) will be reviewed by MDMS Team to determine the best approach via the MDM Solution. If MDMS cannot accommodate, this will be reviewed for manual processing by the Load and Revenue Forecasting (Sandy Allen) Team. MDMS team is unsure if it will be able to accommodate.	The OATT Tariff quantities will be calculated using the aggregated interval data from MDMS and/or Itron and generation forecasts from the LRS and transmission loss factors. OATT Tariff will be calculated as per section 3.4.3 of the Implementation guide.	MDMS Project Team	Tariff	Load Revenue Project Team SMOC	

110	3.5	Set Up	Distribution Tariff calculations and preparation for Invoicing (excluding Administration Charges) will be reviewed by CIS Team to determine the best approach via the MDM Solution. If CIS cannot accommodate, this will be reviewed for manual processing by the Load and Revenue Forecasting (Sandy Allen) Team. CIS team expects to be able to accommodate.	The DT Tariff quantities will be calculated using demand or energy readings based on the customer rate class and calculating the DT tariff quantities following section 3.5.2 of the Implementation guides	CIS Project Team	Tariff	Customer Care Load Revenue Project Team	CIS
112	4	Set Up	The expected method for data and monthly invoice delivery to the LRS will be via SFTP Site. i.e., MV90 to MDMS; consolidate data in MDM, lock in Monthly and send to SFTP site.	Customer to LRS communication is via a secure SFTP site.	MDMS	LRS Settlement, Billing, and Invoicing	Customer Care Load Revenue Project Team	
114	2.5	Set Up	Transformer Ownership Credit (TOC) (applicable customers received a $0.32 credit on demand charge if they own their own transformer – typically applies to larger customers). The Distribution Tariff has provision for application of the TOC, so if the Distribution Tariff charges are calculated in CIS, this will likely not be an issue.	The Transformer Ownership Credit must be applied (where applicable) to the DT. This is maintained in CIS and will be included as a miscellaneous charge against the customers account	CIS	Tariff	Load Revenue Project Team SMOC	CIS
115	2.5	Set Up	Distribution Loss Factor Adjustments are not applicable to Transmission-connected customers. Is there a way to identify these customers in CIS/MDM so that a distribution loss factor adjustment is not applied to these customers during the aggregation process? [2023-03-30, DS: Emailed Sandy Allen and Lauren Boutilier to determine what options are available.]	Distribution loss factors will not be applied to transmission connected customers. Transmission versus distribution customers can only be identified in CIS.	MDMS/CIS	Tariff	Load Revenue Project Team SMOC	
116	2.5	Set Up	Loads on the Unmetered Services Rate, which includes (a) Street and Area Lighting, (b) Misc. Lighting, and (c) Misc. Small Loads, are eligible for the RTR Market. Item (a) has multiple offerings, each identified with its own rate code. Items (b) and (c) do not have rate codes shown in the tariff book. How can these items be identified in CIS/MDM for inclusion in the aggregation process?	A report will be developed from CIS to produce the total Kwh quantity for all unmetered services per LRS on a monthly basis to be used by load & revenue in calculating the LRS tariffs	MDMS/CIS	Metering & Load Calculations	Load Revenue Project Team SMOC	CIS
117	2.5	Set Up	Loads on the Unmetered Services Rate do not have metered interval data associated with them. The guide advises that representative load research data should be used to represent these loads in the aggregation process. What load research data is available and how can it be manipulated to match the characteristics of the unmetered load? [2023-03-30, DS: Emailed Sandy Allen to determine what options are available.] [2023-03-30, DS: Sandy replied "We have a very basic load shape for the unmetered class as a whole in the load research data, no idea where it came from but it's basically on in the evening/off in the day I believe. Certainly don't have it broken out in the details below."]	A report from CIS will produce the total Kwh total quantity for all unmetered services on a billing cycle interval (monthly). The Load and revenue team will use this number and apply their generic load shape to this Kwh number to produce interval data for all unmetered services for inclusion in the LRS tariff calculations	MDMS/CIS	Metering & Load Calculations	Load Revenue	
118	3.3	Set Up	Is a Regulatory mechanism required to prevent RTT tariff credits from going back to the LRS? [2023-03-30, DS: Emailed Voytek Grus for comment.]	The RTT Tariff cannot result in a net credit to the LRS within any calendar year. Load & Revenue will track the monthly result of the RTT tariff in oracle and apply a charge in the last bill cycle of the calendar year to reconcile any possible annual credit to the LRS for the previous year.	MDMS/CIS	Tariff	Regulatory	
119	3.1	Set Up	Is a Regulatory mechanism required to monitor the amount of Top-up and Spill under the EBS tariff? Could the LRS make money by intentionally undersubscribing load and receiving payment from NS Power for Spill energy? [2023-03-30, DS: Emailed Voytek Grus for comment.]	Maximum Spill Capacity must be approved by NS Power prior to commencement of service and will be limited to a level agreed as being required to provide the contracted annual amount of participating LRS energy. Spill capacity will be reviewed annually and will include the LRS' proposal to mitigate it on a going forward basis. If NS Power is not satisfied with the LRS' proposal, it may impose a limit on hourly production of the LRS' generation portfolio. REI to submit proposal to Natasha, Voytek and Voytek to provide max.	MDMS/CIS	Regulatory/Compliance/Reporting	Regulatory	

120	3	Set Up	Ensure the tariff calculations include checking for the Minimum Tariff Charge as prescribed in each tariff.	Each Tariff comes with a minimum tariff charge. The calculation of each tariff will take this minimum into consideration.	MDMS/CIS	Tariff	Load Revenue Project Team	
121	4	Set Up	Need to calculate total Distribution Losses and total Transmission Losses in the billing period and include this information on the LRS' invoice for LRS compliance reporting to the UARB.	The calculation of both the distribution and transmission losses will be calculated as part of the tariffs and included on the LRS' invoice	MDMS/CIS	Tariff	Load Revenue Project Team	
122	3.5	Set Up	Regulatory advises that separate sets of Distribution Loss Factor Adjustments are required for ENERGY-based and DEMAND-based tariff calculations. Also, Regulatory is assessing the need for updating these factors monthly vs. annually.	Annually adjusted loss factors for both ENERGY and DEMAND based tariffs will be calculated and delivered by Voytek. The factors will be based on losses filed as part of a Base Cost of Fuel or GRA proceeding (whichever is most recent). These factors will be reviewed on an annual basis	MDMS/CIS	Regulatory/Compliance/Reporting	Load Revenue Regulatory	
126	3.5.1	Set Up	Create 'LRS Billing Inquiry' form for the LRS to complete if they deem a NSP review of a customer issue is required	The LRS will communicate billing inquires from either them or their customers to NSPI via the secure SFTP site and the shared RTR project team email inbox. The RTR project team will communicate the billing inquiry to Customer Care who will coordinate the response on behalf of NSPI	Customer Care/Customer Billing	Customer Transactions	Customer Care LRS	
127	2.3	Ops	NS Power will provide meter readings and interval data for each customer to the LRS	NS Power will provide meter readings and hourly interval data for each customer to the LRS	Project Team SMOC LRS	Metering & Load Calculations	Load Revenue Project Team SMOC	
128	3.4.3	Ops	LRS must provide a generation forecast monthly to allow for the development of the OATT tariff	The LRS will provide an hourly generation estimate on a monthly basis to support the calculation of the OATT tariff billing determinant	LRS	Tariff	Load Revenue LRS Project Team SMOC	
129		Ops	15 minute interval data must be provided for use in calculating peak demand for use in calculating the distribution tariff	Peak demand data will be provided from MDMS derived from 15 minute interval data for use in calculating the distribution tariff. This peak data is to be derived in either KW or KVA depending on the rate class of the customer. See distribution Tariff Rates.		Metering & Load Calculations	Load Revenue Project Team SMOC	MDMS
130		Ops	NS Power customer exit criteria	The following criteria must be satisfied should a NS Power customer desire to transfer to an LRS: 1. Customers with financing arrangements must conclude that contract prior to transitioning to LRS. This includes financing with E1 for energy efficiency projects, Tesla smart grid pilot, and heating products such as heat pumps 2. Customers with hardware requirements (i.e.: AMI, bidirectional, or backup meter installation) must agree to installation at their cost prior to transitioning to LRS 3. Customers must pay in-arrears balances on their account prior to transitioning to LRS. 4. Customers wishing to make charitable donations will no longer be able to do so through their utility payments.		Customer Transactions	Customer Care LRS	CIS
131		Ops	NS Power EV credit	Customers that leave NS Power for an LRS will not longer be eligible to receive the EV charging credit		Customer Transactions	Customer Care LRS	CIS
132		Ops	LRS customers with 'behind the meter' generation	Customers joining an LRS that have a generation source behind a single meter will be required to have a bidirectional meter installed before joining the LRS. The bidirectional meter is required for the capturing of both generation and consumption interval data for the use of tariff calculations		Metering & Load Calculations	Customer Care Field Services SMOC	CIS MDMS
133		Ops		New LRS Customer accounts will have the following attributes set to ensure identification and prevent billing Billing class set to "LR" Special Handling code set to "GB" Use Cust Info? Set to "Group Billing - Use Customer Info"		LRS Settlement, Billing, and Invoicing	Customer Care	CIS
134		Set Up		A new billing class is to be created and assigned to each LRS and LRS customer account as they are created		LRS Settlement, Billing, and Invoicing	Customer Care	CIS
135		Ops		Existing service order types will be used to execute the transfer of customers between an LRS and NSP. DISCA - AMI Disconnect Service Order CONNA - AMI Connect Service Order		Customer Transactions	Customer Care	CIS
136		Ops		The time of the peak system load for each billing period for the SST Tariff will be pulled from the Hourly Total Net Nova Scotia Load on OASIS		Tariff	Load Revenue	
137		Ops		The planning reserve margin will be retrieved from the 10 year system outlook report on OASIS for the SST Tariff		Tariff	Load Revenue	

							Testing					
ID	RTR Impl. Guide Section	Phase	M- Mandatory D - Desirable	Requirement Status	Comments	Reference Document/Artifact	Unit Test ID	Unit Test Status	Functional Test ID	Functional Test Status	UAT ID	UAT Status
8	2.1	1		Complete	Duplicate with 110/11? Same process as #5 using different calculations. Specific customer requests outside of (wires provider services) will require work order and direct billing to customer JK - not a duplicate		3.G - 3.H 4.D - 4.E	Passed (3G NA)	4.5 - 4.12	NA	Unit/Functional	NA
9	2.1	1		Complete	Payments to LRS require potential new accounting/codes to be setup (EBS Tariff) JK - Meeting summary notes sent on 6/21/2023 following meeting with Terri Furlong		4.A	NA	Unit	NA	Unit/Functional	NA
10	2.3	1		Complete	Cumulative monthly meter readings and hourly metered data to calculate charges and credits (page 7 of guideline) Confirm AMI limitations in terms of connected to devices in different areas. Process for addressing situations where AMI meter does not work at a specific LRS customer location. Confirm with Glen MacLeod and Sandy Allen Matt/Dave - met with AMI team please RTR Req ID 10 and 11 - RTR Meeting With Smart Meter Operations Centre in the RTR Requirements Folder Next Step: Schedule additional meetings with AMI and Load Revenue Forecast groups		2.A 2.B	Passed	2.1,2.2,3.2	Passed	Unit/Functional	Passed
11	2.3	1		Complete	Assumption that AMI tools would be able to provide this data Matt/Dave - met with AMI team please RTR Req ID 10 and 11 - RTR Meeting With Smart Meter Operations Centre in the RTR Requirements Folder Next Step: Schedule additional meetings with AMI and Load Revenue Forecast groups		2.C - 2.E	Passed	2.1	Passed	Unit/Functional	Passed
13	2.4	1		Complete	Assumption that LRS is provided customer specific meter usage data contained within cycle invoice (distribution tariff, page 31 of the guide). Work with Aaron MacLean and Sandy Allen on invoice layout. Devise mechanism to ensure invoices aren't automatically pushed through CIS to individual customer (potential new solution i.e. Web Accounting (potential group billing in CIS)). Ensure monthly administration charge added to each tariff invoice ($1053.03 for EBS - review with Regulatory to see if updates are required and understand the process) JK - Process 4.0 details this flow		4.E	Passed	3.28	Passed	Unit/Functional	Passed

14	2.5	1		Complete	See page 10 and 11 in the guide. 5 steps for the load side, 4 for generation. Leverage technology (Web Accounting or other) to perform calculations		3.A	Passed	3.4	Passed	Unit/Functional	Passed
15	2.5	1		Complete	See page 10 and 11 in the guide. 5 steps for the load side, 4 for generation. Leverage technology (Web Accounting or other) to perform calculations		3.B	Passed	3.5	Passed	Unit/Functional	Passed
17	3.1.3	1		Complete	Adjust tariff calculations to account for Loss Factors (page 14 in guide outlines Loss Factor calculations). ECC Compliance updates zone based Loss Factors on an annual basis - no change Confirm with Sandy Allen process for updating Loss Factor calculations for each tariff and each invoices. Create a Loss Factor calculation process document see page 9 of guide		3.D 3.F	Passed	Unit	Passed	Unit/Functional	Passed
18	3.1.4	1		Complete	See page 15 in guide - align technology solution to the process steps outlined in the diagram		3.I	Passed	3.6	Passed	Unit/Functional	Passed
20	3.2.2	1		Complete	see page 18 of guide		3.J	Passed	3.9 - 3.19	Passed	Unit/Functional	Passed
22.1	3.2.3	1		Complete	https://www.nspower.ca/docs/default-source/monthly-reports/10-year-system-outlook-report.pdf?sfvrsn=d39bca29_60		3.J	Passed	Unit	Passed	Unit/Functional	Passed
23	3.3.1	1		Complete	See #5 and page 22/23 of guide		3.K	Passed	3.21, 3.23	Passed	Unit/Functional	Passed
26	3.4.3	1		Complete	Load Revenue team will need a tool and process to capture generation forecast for each LRS generator for the purpose of calculating the OATT Schedule 4A charges - see section 3.4.3, step 11 of the guide and OATT Schedule 4A Matt/Dave - check with Sandy and Ron to see who knows/ is the SME on this currently Leverage existing process (JK) - meeting setup with Gordon Mackenzie following call with load and revenue (JK) - Outcome of meeting with Gordon Mackenzie: Existing tool not currently being supported and merely maintained. Advice not to use existing tool for RTR market		5.B	Passed	7.1	Passed	Unit/Functional	Passed
27	3.4.3	1		Complete	Regulatory will need a process to determine monthly average system marginal cost (for both on-peak and off-peak) and provide to Load Revenue team for the purpose of calculating the OATT Schedule 4A charges - see section 3.4.3, steps 14-15 of the guide and OATT Schedule 4A Matt/Dave - confirm with Sandy where this information comes from This data is provided from "Fuels" via a SharePoint site on a monthly basis. Load and revenue will be able to calculate the average from this data to calculate the tariffs		3.L	Passed	Unit	Passed	Unit/Functional	Passed
29	3.5.2	1		Complete	Load Revenue/CIS will need to develop a process to bill LRS for Demand Side Management Recovery Charges and any applicable costs incurred by NSPI resulting from performance of repairs, changes, renewals, improvements or replacements outside of normal working hours, at the RtR Customer's request - see section 3.5.2 of the RTR Implementation Guide and section 11.2 of the Distribution Tariff Next Step: Schedule meeting with Kim Kenny in early 2023		3.G - 3.H 4.D	Passed (3G NA)	4.2	Passed	Unit/Functional	Passed

30	4	1		Complete	see page 32 of guide Project team to review and confirm additional processes or fees potentially missed during drafting of guideline Fees for specific report requests Info requests Dispute processing Audit requests JK - processes 3, and 3.1 detail this flow		4.E	Passed	7.1	Passed	Unit/Functional	Passed
33	5.2.5	1		Complete	Document process to capture and update LRS credit assurance requirements LRS customer care coordinator to review and update monthly (if required) Determine if adjustments are required through an invoice see page 34 of guide		8.A	Passed	8.1	Passed	Unit/Functional	Passed
34	6	1		Complete	Conduct workshop with Agathe de Saint-Denis to confirm self service mechanism on NS Power website is possible. One web based form with three attachments (required forms). Requires push to email inbox and business process within Customer Care to complete see page 36-41 in guide See RTR Workflows Document Diagram 1 Sample RCTRA form contained within the implementation guide - Appendix 12	RTR Workflows	5.B - 5.C 7.A	Passed	7.6	Passed	Unit/Functional	Passed
35	6.7	1		Complete	Conduct workshop with Agathe de Saint-Denis to confirm self service mechanism on NS Power website is possible. One web based form with three attachments (required forms). Requires push to email inbox and business process within Customer Care to complete see page 36-41 in guide See RTR Workflows Document Diagram 1.1 Sample RCTRA form contained within the implementation guide - Appendix 12	RTR Workflows	1.C - 1.S	Passed	1.1	Passed	Unit/Functional	Passed
36	6.7.2	1		Complete	Process change to be reviewed with Customer Care/Tara Cranston See RTR Workflows Document Diagram 1.5 Sample RCTRA form contained within the implementation guide - Appendix 12	RTR Workflows	Functional	Passed	1.3	Passed	Unit/Functional	Passed
38	6.7.4	1		Complete	Setup process to direct all requests to the LRS coordinator See RTR Workflows Document Diagram 1.3 Sample RCTRA form contained within the implementation guide - Appendix 12	RTR Workflows	7.A	Passed	7.6	Passed	Unit/Functional	Passed

40	4	1		Complete	The Provincial HST Rebate is currently applied as a separate line item on the bundled customer's bill by NS Power. Will NS Power apply the rebate to the retail customer's Distribution Tariff bill it sends to the LRS or will the LRS apply the rebate to the bill it sends to the retail customer, or perhaps a combination of both? Response from Eric F.: I recall we will bill the LRS for the Distribution Charges applicable to LRS's customers and the LRS will bill the RTR customers. I would expect we would include HST and rebate applicable to the Distribution Charge in accordance with other services provided by NS Power and the LRS would do the same. However, will need input from Voytek and Corporate Tax to confirm. Meeting scheduled with corporate tax for June 6, 2023 (JK) Meeting held with corporate tax (Stephen Wilson). Stephen will draft a questions for us to present to the LRS (JK) Stephen Wilson provided this direction to the RtR project team via email deliver on 2023-06-12		4.E	Passed	4.2	Passed	Unit/Functional	Passed
42	3.5	1		Complete	See section 7.6 of the UARB GRA decision.		3.G - 3.H 4.D - 4.E	Passed (3G NA)	4.2	Passed	Unit/Functional	Passed
48	6.2	1		Complete	Identified in workshop with Aaron MacLean and Sandy Allen.		1.C - 1.S 2.B	Passed	1.2	Passed	Unit/Functional	Passed
53	2.3	1		Complete			2.B 2.D	Passed	Unit	Passed	Unit/Functional	Passed
54	2.3	1		Complete			2.A 2.C	Passed	1.1	Passed	Unit/Functional	Passed
57	TBD	1		Complete			1.Q -1.S 4.F	Passed	4.2	Passed	Unit/Functional	Passed
58	6.2 & 4	1		Complete			1.E	Passed	1.1	Passed	Unit/Functional	Passed
59	4	1		Complete			1.K	Passed	4.2	Passed	Unit/Functional	Passed
63	6.2	1		Complete			4.C	Passed	4.21	Passed	Unit/Functional	Passed
68	6	1		Complete	confirm srvm Jamie to follow up with CIS team (JK) Jamie followed up with Aaron. This is the 'services' part of CIS hierarchy. This was proposed as a method to prevent billing		1.G	Passed	1.2	Passed	Unit/Functional	Passed
70	6	1		Complete			1.E	Passed	1.1	Passed	Unit/Functional	Passed

71	4	1		Complete			3.A - 3.L	Passed (3G NA)	4.2	Passed	Unit/Functional	Passed
73	4	1		Complete			3.A - 3.L	Passed (3G NA)	4.1	Passed	Unit/Functional	Passed
75	4	1		Complete			2.D	Passed	Unit	Passed	Unit/Functional	Passed
80	6.4	1		Complete	RTR Implementation Guide: Section 6.4 LRS Notification develop responses for rejection (privacy reasons)		1.C - 1.S	Passed	7.3	Passed	Unit/Functional	Passed
81	6.6	1		Complete	RTR Implementation Guide: Section 6.6 NS Power Service Level for Customer Transfers Licensed Retail Supplier Terms and Conditions: Section 11.5 UARB Matter M06214, UARB Decision, paragraph 121 NS Power Compliance Filing, section 3.8 LRS Terms and Conditions (LRS T&Cs) Potential duplicate of 52 (JK)		1.C - 1.S	Passed	7.3	Passed	Unit/Functional	Passed
82	6.7	1		Complete	Licensed Retail Supplier Terms and Conditions, section 11.8		1.C - 1.S 4.F	Passed	7.3	Passed	Unit/Functional	Passed
83	6.2	1		Complete	Licensed Retail Supplier Terms and Conditions, section 8.0		1.C - 1.S	Passed	7.2	Passed	Unit/Functional	Passed
84	6.2	1		Complete	Licensed Retail Supplier Terms and Conditions, section 8.0		1.C - 1.S	Passed	7.2	Passed	Unit/Functional	Passed
85	4	1		Complete	Guide to Purchasing Renewable Low-Impact Electricity in Nova Scotia (page 6) Reword that we are taking the direction for monthly billing (JK)		1.K	Passed	4.2	Passed	Unit/Functional	Passed
86	3.5	1		Complete			3.G - 3.H 4.D - 4.E	Passed (3G NA)	4.2	Passed	Unit/Functional	Passed
87	2.5	1		In Progress	schedule workshop (JK) Decision request with regulatory as of June 14 Accounted for in phase 2		1.C - 1.S	Passed	4.2	Passed	Unit/Functional	Passed

89	6.7.5	1		Complete	If we follow RCTRA processes all customer information updates come from LRS		7.A	Passed	7.2	Passed	Unit/Functional	Passed
93	3.5	1		Complete	Reference Distribution Tariff section 11.1.		3.G - 3.H 4.D - 4.E	Passed (3G NA)	4.5 - 4.12	NA	Unit/Functional	NA
94	TBD	1		Complete	You must first be an NSPI customer prior to becoming eligible for RtR		1.C - 1.S	Passed	1.2	Passed	Unit/Functional	Passed
95	6.2	1		Complete	Thursday March 16 Workshop		7.A	Passed	7.5	Passed	Unit/Functional	Passed
103	6.2	1		Complete			1.A - 1.B	Passed	1.1	Passed	Unit/Functional	Passed
106	3.1	1		Complete			2.C - 2.I 3.D	Passed	3.6 - 3.8	Passed	Unit/Functional	Passed
107	3.2	1		Complete			2.C - 2.I 3.C	Passed	3.9 - 3.19	Passed	Unit/Functional	Passed
108	3.3	1		Complete			2.C - 2.I 3.C 3.E	Passed	3.2 - 3.23	Passed	Unit/Functional	Passed
109	3.4	1		Complete			2.C - 2.I 3.F	Passed	3.24 - 3.27	Passed	Unit/Functional	Passed

110	3.5	1		Complete	Review - this may now be CIS		3.G - 3.H	Passed (3G NA)	4.5 - 4.12	NA	Unit/Functional	Passed
112	4	1		Complete			5.B - 5.C	Passed	7.1	Passed	Unit/Functional	Passed
114	2.5	1		Complete			3.G - 3.H 4.D - 4.E	Passed (3G NA)	4.2	Passed	Unit/Functional	Passed
115	2.5	1		Complete			3.G - 3.H 4.D - 4.E	Passed (3G NA)	4.5 - 4.12	NA	Unit/Functional	NA
116	2.5	1		Complete	JK - Discussed with Sandy Allen, Voytek Grus, Dave Stanford on June 19th		3M	Passed	4.5 - 4.12	NA	Unit/Functional	NA
117	2.5	1		Complete	JK - Discussed with Sandy Allen, Voytek Grus, Dave Stanford on June 19th		3M	Passed	Unit	Passed	Unit/Functional	Passed
118	3.3	1		In Progress	(JK) on agenda with regulatory. Waiting on the UARB decision (JK) - decision request to be drafted to regulatory to confirm the mechanism for enforcing the prevention of an annual credit to the LRS for the RTT tariff Accounted for in phase 2		4.C	Passed	3.23	NA	Unit/Functional	NA
119	3.1	1		In Progress	(JK) - Pending regulatory approving decision request Accounted for in phase 2		3.I	Passed	3.6 - 3.7	Passed	Unit/Functional	Passed

120	3	1		Complete			3.A - 3.L	Passed (3G NA)	3.6 - 3.27	Passed	Unit/Functional	Passed
121	4	1		Complete			4.E	Passed	3.6 - 3.27	Passed	Unit/Functional	Passed
122	3.5	1		Complete			3.A - 3.L	Passed (3G NA)	3.6 - 3.27	Passed	Unit/Functional	Passed
126	3.5.1	1		Complete			5.B - 5.C 7.A	Passed	7.1	Passed	Unit/Functional	Passed
127	2.3	1		Complete			4.E	Passed	5.6	Passed	Unit/Functional	Passed
128	3.4.3	1		Complete			3.L	Passed	7.1	Passed	Unit/Functional	Passed
129		1		Complete			2.D	Passed	4.2	Passed	Unit/Functional	Passed
130		1		Complete			1.C - 1.S	Passed	1.1	Passed	Unit/Functional	Passed
131		1		Complete	(JK) - requirements outlined in meeting on RTR financing items on June 5th		1.C - 1.S	Passed	1.2	Passed	Unit/Functional	Passed
132		1		In Progress	(JK) - outcome of regulatory decision. In Dave's meeting notes for meeting on May 31, 2023 Accounted for in phase 2		2.D	Passed	1.1	Passed	Unit/Functional	Passed
133		1		Complete			1.C - 1.S	Passed	1.1	Passed	Unit/Functional	Passed
134		1		Complete			1.E	Passed	Unit	Passed	Unit/Functional	Passed
135		1		Complete			1.Q - 1.R	Passed	1.2	Passed	Unit/Functional	Passed
136		1		Complete	Outcome of meeting June 15th https://www.nspower.ca/oasis/monthly-reports/hourly-total-net-nova-scotia-load		3.C	Passed	Unit	Passed	Unit/Functional	Passed
137		1		Complete	Outcome of meeting June 15th https://www.nspower.ca/docs/default-source/monthly-reports/10-year-system-outlook-report.pdf?sfvrsn=d39bca29_60		3.C	Passed	Unit	Passed	Unit/Functional	Passed

Nova Scotia POWER
An Emera Company

Summary	
Project Name	Renewable to Retail
Project Start Date	
Project End Date	
Project Description	
Total Requirements	123
Requirements Not Started	1
Requirements in Progress	6
Requirements Completed	115
Project Manager	Doug Smith

Requirement Details

ID	RTR Impl. Guide Section	Requirement Type	Initial Requirement	Architecture Section	Business Area Impacts	Supporting Technology	M- Mandatory D - Desirable	Requirement Status
1	1.4	Non-Functional	The following entities may participate in the RtR Market; 1. Certified Generator of renewable low-impact electricity located in Nova Scotia that supply electricity to LRS's customers (Generation Resource may be contracted or LRS owned) 2. Licensed Renewable Suppliers (LRS), licensed by the Board to sell the renewable electricity who utilize tariffed delivery services and balancing services from NS Power to enable the delivery of electricity to their retail customers 3. Retail electricity customers in Nova Scotia who enter intro contracts with an LRS for their renewable electricity supply and take service from NS Power under the Distribution Tariff	1. Identify	LRS		M	Complete
2	1.5	Non-Functional	Municipal Utilities and their retail customers are not eligible to participate in the RtR Market	1. Identify	LRS		M	Complete
3	1.5	Non-Functional	Transmission-connected RtR customers must enter a special operating agreement with NS Power	1. Identify	LRS		M	Complete
4	2.1	Non-Functional	Customers who remain with NS Power must not incur additional costs of their bundled service as a result of the RtR market (not already accounted for by the RtR Tariffs). The retail suppliers and their customers are responsible for all costs related to the new market that would otherwise be the responsibility of NSP and its customers.	4. Bill	Billing Customer Care		M	Complete
5	2.1	Non-Functional	The delivery of "wires-provider services such as outage management, response to trouble calls, connections and disconnections, meter reading, customer service, etc. will be the responsibility of NSP under the RtR market	1. Identify	Customer Care Outage Coordination	ADMS CIS Maximo	M	Complete
6	2.1	Functional	Any work completed by NSP such as: "wires-provider services such as outage management, response to trouble calls, connections and disconnections, meter reading, customer service, etc will be charged to a customer account and aggregated by their corresponding LRS and the LRS billed accordingly	1. Identify	Customer Care Outage Coordination	ADMS CIS Maximo	M	Complete
7	2.3	Functional	NSP will provide meter readings and interval data for each of the LRS' customers to the LRS	5. Transfer	Billing Customer Care	CIS SFTP	M	Complete
8	2.3	Functional	NSP will charge LRS' with the costs to supply and install metering devices and communications equipment and services	4. Bill	Billing Customer Care	CIS Maximo	M	Complete
9	2.3	Non-Functional	NS Power regulations with respect to metering will apply to the RtR market	4. Bill	Billing	CIS	M	Complete
10	2.4	Functional	NSP will bill the LRS monthly based on the aggregated meter readings of the LRS's customers via the tariffs (EBS, SS, RTT, OATT)	4. Bill	Billing	CIS	M	Complete
11	2.4	Functional	NSP will not bill the end-use RtR customers for distribution services under the Distribution Tariff directly. Instead NSP will consolidate these charges on the LRS' monthly invoice for payment by the LRS.	4. Bill	Billing	CIS	M	Complete
12	2.4	Functional	While a customer in the RtR market is not charged directly, a detailed history of the customers charges and energy usage will be maintained against the individual customer account	4. Bill	Billing	CIS	M	Complete
13	2.4	Functional	The LRS customer will receive only one bill - the bill from the LRS. NSP must never send a bill to customer electing to sign a contract with a LRS	4. Bill	Billing	CIS'	M	Complete
14	2.5	Non-Functional	Apart from residing within the province of NS there are no additional geographical restrictions regarding the physical location of the LRS' generation and the LRS customers	2. Collect-Isolate	Customer Care SMOC	CIS MDM	M	Complete

15	2.5	Functional	RtR customer hourly interval data must be aggregated by the following rate classes: Domestic (Including TOD, however, TOD variable pricing will not be available to RtR customers) Small General Large General Small Industrial Medium Industrial Large Industrial (Firm) Outdoor Recreational Lighting Unmetered Services *Note - transmission connected customers be aggregated separately from their distribution connected counterparts as transmission connected customers will not have distribution losses associated with them	2. Collect-Isolate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
16	2.5	Functional	The aggregated hourly interval data by rate class must be adjusted by applying the class-specific distribution loss factors	2. Collect-Isolate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
17	2.5	Functional	The total amount of distribution losses in kWh must be calculated per billing period and communicated on the LRS' invoice for use in compliance reporting	2. Collect-Isolate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
18	2.5	Non-Functional	NSP will provide each LRS with the hourly interval data for each of their generators for use in their compliance reporting	5. Transfer	Customer Care	CIS	M	Complete
19	2.5	Functional	Each LRS generator profile must be adjusted using the applicable Locational Loss Factor. The Loss factors will be supplied by the NSPSO and published on OASIS	2. Collect-Isolate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
20	2.5	Functional	The locational loss adjusted generation interval data will be aggregated for each LRS	2. Collect-Isolate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
21	2.5	Functional	The total amount of transmission losses in KWh must be calculated per billing period and communicated on the LRS' invoice for use in compliance reporting	2. Collect-Isolate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
22	3.1.4	Functional	NSP must evaluate the energy balancing at each hourly interval for a billing cycle (Top-Up or Spill) by comparing the LRS' Total Distribution Loss-Adjusted Load Hourly Profile with the LRS' Total Transmission Loss-Adjusted Hourly Generation Profile	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
23	3.1.4	Functional	NSP will total the sum of each of the hourly intervals top-up or spill to determine the total EBS.	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
24	3.1.4	Functional	NSP will bill or credit the LRS for each billing cycle based upon the total sum of the EBS tariff at the appropriate rate plus the additional administrative charge	4. Bill	Billing Load & Revenue SMOC	CIS MDMS	M	Complete
25	3.2.3	Functional	NSP will determine the time of the system load peak and using the distribution-loss adjusted class profiles determine the Class Monthly Peak Firm Demand (CMFPDi)	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
26	3.2.3	Non-Functional	The CMFPDi for the unmetered customer class will be determined using NSP research based class load profile	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
27	3.2.3	Functional	NSP must calculate the equivalent firm peak demand for each rate class by multiplying the CMFPDi by the Class Monthly Demand Adjustment factors (CMDAFi) for the applicable billing period	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
28	3.2.3	Functional	NSP must sum the demands for each class to determine the LRS Winter Firm Peak Demand (LWPFD)	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
29	3.2.3	Functional	NSP must determine the Monthly Standby Contract Demand (MSCD) using the formula outlined in the implementation guide section 3.2.3	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
30	3.2.3	Functional	NSP must bill the LRS for each billing cycle based upon the total sum of the MSCD at the appropriate rate plus the additional administrative charge	4. Bill	Billing Load & Revenue SMOC	CIS MDMS	M	Complete
31	3.3.3	Functional	NSP must evaluate the RTT Demand for each LRS for each billing cycle	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
32	3.3.3	Functional	NSP must evaluate the RTT Energy for each LRS for each billing cycle	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
33	3.3.3	Functional	NSP must bill the LRS for each billing cycle based upon the total Energy and Demand at the appropriate rates	4. Bill	Billing Load & Revenue SMOC	CIS MDMS	M	Complete

34	3.4	Non-Functional	The following OATT tariff schedules are applicable to the RtR market: **Transmission Service:** Schedule 10: Network Integration Transmission Service **Ancillary Services:** Schedule 1: Scheduling, System Control, & Dispatch Schedule 2: Reactive Control and Voltage Control Schedule 3: Regulation Schedule 3: Load Following Schedule 5: Operating Reserve (Spinning) Schedule 6: Operating Reserve (Supplemental 10min) **Schedule 4A Generation Forecasting Service:** On Peak: 07:00 to 24:00 Monday to Friday Off Peak: All other hours	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
35	3.4.3	Functional	NSP must identify the OATT demand as the load corresponding to the peak interval load increased by transmission losses	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
36	3.4.3	Functional	NSP must retrieve the LRS' Hourly Generation forecast for the billing period	3. Aggregate-Calculate	Billing Load & Revenue LRS SMOC	MDMS MV-90 Forecast tool TBD	M	Complete
37	3.4.3	Functional	NSP must calculate the forecast deviation bands for each hourly interval for the billing period	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
38	3.4.3	Functional	NSP must evaluate the hourly forecast discrepancy by comparing the actual generation versus the LRS provided forecast	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
39	3.4.3	Functional	NSP must calculate the charges for each hourly interval for any interval exceeding the deviation bands	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
40	3.4.3	Functional	NSP must bill the LRS for each billing cycle based upon the OATT quantities for each of the OATT applicable schedule rates	4. Bill	Billing Load & Revenue SMOC	CIS MDMS	M	Complete
41	3.5.1	Non-Functional	The Distribution Tariff is not applicable to Transmission connected customers	1. Identify	Billing Load & Revenue SMOC	CIS MDMS	M	Complete
42	3.5.1	Functional	LRS customers flagged as transmission connected customers will be excluded from calculations associated with the Distribution tariff	1. Identify	Billing Load & Revenue SMOC	CIS MDMS	M	Complete
43	3.5.2	Functional	NSP customers of the following classes are to be billed based on monthly energy consumption for the billing period: Domestic (including domestic TOD, however, RtR customers will not be eligible for variable pricing) Small General Outdoor Recreational Lighting	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
44	3.5.2	Functional	RtR customers will have a miscellaneous charge assigned to their accounts for the following: 1. Minimum monthly charge 2. Transformer Ownership Credit where applicable (except for Outdoor Recreational Light Class)	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
45	3.5.2	Functional	NSP customers of the following classes are to be billed based on kVA demand for the billing period or the maximum actual demand of the previous December, January or February occurring in the previous 11 months General Large General Small Industrial Medium Industrial Large Industrial	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
46	Workshops	Functional	NSP will bill unmetered and miscellaneous small loads as fixed/recurring charges at the DT tariff rate in CIS against the individual customer account.	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete

47	Workshops	Functional	Details of the all individual charges to a customer account will be provided to the LRS alongside their monthly bill. (DT Tariff, completed work orders, wires services, etc)	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS MV-90	M	Complete
48	Nova Scotia Power Distribution Tariff - 11.2	Functional	Distribution Tariff Charges may include the following: 1. All fees and charges for the provision of Distribution System Access under this DT 2. Demand Side Recovery Charges 3. Any applicable costs incurred by NS Power resulting from performance of repairs, changes, renewals, improvements or replacements outside of normal working hours, at the RtR Customers request 4. Other items as may be approved by the Board	3. Aggregate-Calculate	Billing Load & Revenue	CIS	M	Complete
49	4.1	Functional	NSP must invoice the LRS on a monthly basis within a reasonable time after the first day of the month.	4. Bill	Billing Load & Revenue SMOC	CIS MDMS	M	Complete
50	4.1	Functional	The LRS must pay within 20 calendar days of the billing date	4. Bill	LRS		M	Complete
51	4.1	Functional	The LRS invoice must contain the following information: 1. The period to which the invoice applies 2. A description of services provided and amount due or credited 3. The total amount due (after netting of any charges and credits) within 20 days and the effective date of any interest charges 4. All monetary amounts in Canadian Dollars	4. Bill	Billing Load & Revenue SMOC	CIS MDMS	M	Complete
52	5.2.3	Non-Functional	An LRS is eligible to receive NS Power's Tariffed Services if they meet the following: 1. Have a Retail Supplier License issued by the Board 2. Execute the LRS Participation Agreement 3. Adhere to the LRS financial security requirement 4. Become a Market Participant under the NS Market Rules	1. Identify	LRS		M	Complete
53	5.2.5	Non-Functional	Each LRS must provide credit assurance in the amount of 200% of the forecasted payment for the LRS tariffed services and DT charges combined rounded to the nearest $1000	8. Credit Assurance	Customer Care LRS Risk Management		M	Complete
54	5.2.5	Non-Functional	NS Power may adjust the level of security required from the LRS no more than once per calendar month based upon NSP forecast of the LRS tariffed services and DT charges	8. Credit Assurance	Customer Care LRS Risk Management		M	Complete
55	5.2.5	Non-Functional	If at any point the LRS is provided written notice of an increase in required credit assurance they must provide the additional credit assurance within 3 days otherwise NSP reserves the right to terminate the relationship with the LRS	8. Credit Assurance	Customer Care LRS Risk Management		M	Complete
56	6.2	Functional	To initiate a customer transfer, obtain or provide customer information, the LRS must complete and submit to NSP an application from (RtR Customer Transaction Request Application - RCTRA)	7. Customer Transactions	Customer Care LRS	Salesforce Webform (TBD)	M	Complete
57	6.2	Functional	The Customer Transaction form must accommodate the following transaction types: 1. Transfer current NSPI customer to become an RtR Customer of the LRS "TCC" 2. Enroll a customer that is not an NSPI customer as an RtR Customer of the LRS "TNC" 3. Return a current LRS' Customer NSPI's service "RLC" 4. Transfer an LRS' Customer to an alternate LRS "TLC" 5. Customer Information Request from NS Power by an LRS "CIR" 6. RtR Customer Information Update to NS Power by an LRS "CIU" And any other service request types as determined by NS Power	7. Customer Transactions	Customer Care LRS	Salesforce Webform (TBD)	M	Complete
58	6.2	Functional	RCTRA forms received from LRS' will be processed in the order they are received and given a unique ID number and timestamp	7. Customer Transactions	Customer Care	Salesforce Webform (TBD)	M	Complete
59	6.2	Functional	The RCTRA must be fully completed and signed by both the LRS and the customer before being accepted by NS Power	7. Customer Transactions	Customer Care LRS	Salesforce Webform (TBD)	M	Complete
60	6.2	Non-Functional	NSP has the right to refuse to accept an RCTRA **Customer Transfer Request** for any customer who has outstanding debt which is in arrears and payable to NSP	7. Customer Transactions	Customer Care LRS		M	Complete
61	6.4	Non-Functional	NSP must provide notification to the LRS upon the completion of an RCTRA. If the RCTRA is rejected provide the reason for rejection of the RCTRA request.	7. Customer Transactions	Customer Care LRS		M	Complete
62	6.4	Functional	NSP must record the LRS of record against the premise of the customer when a new RtR customer joins an LRS	1. Identify	Customer Care	CIS	M	Complete
63	6.6	Non-Functional	NS Power will use Reasonable Efforts to process each RtR Customer Transaction Request Application and complete the installation of interval metering devices and communications equipment and services to transfer of the RtR Customer to LRS supply with fourteen calendar days of receipt of the RtR Customer Transaction Request Application	7. Customer Transactions	Customer Care	Salesforce Webform (TBD)	M	Complete

64	6.6	Non-Functional	RtR Customers will continue to have access to MyAccount should they wish under their new account number.	1. Identify	Customer Care	MyAccount	M	In Progress
65	6.6	Functional	RtR customers will continue to have access to MyAccount corresponding to their NSP account number with access to their historical billing and usage information. Future billing and usage information will not be populated under the NSP account number.	1. Identify	Customer Care	MyAccount	M	In Progress
66	6.6	Functional	RtR customers will have access to MyAccount corresponding to their new account number but their historical billing and usge information will not be available under this account number. Furthermore, future billing and usage information will not be populated.	1. Identify	Customer Care	MyAccount	M	In Progress
67	6.6	Functional	RtR customers will have the ability to raise service orders for the property through the MyAccount portal as they would as a regular NSP customer but only under their active RtR account number. Any services orders raised under the inactive original NSP account number should not be executed	1. Identify	Customer Care	MyAccount	M	In Progress
68	Jill Email Jan 18th	Non-Functional	Donations Customer donations to Home Energy Assistance Top-up for distribution to lower income families; administered by Salvation Army This is an option for the LRS to provide the service for their new customers. Options for this specific programs include: a)LRS will let their customer know they (the LRS) cannot offer this service to customers. b)LRS recommends customer stay with NS Power to continue with this service or the LRS advises on the option for customer to contribute directly to the Salvation Army. OR c)LRS can and will continue this service for customers.	7. Customer Transactions	Billing Customer Care	CIS	M	Complete
69	Jill Email Jan 18th	Non-Functional	Green Power Blocks This program will no longer apply to customers moving to the LRS	7. Customer Transactions	Billing Customer Care	CIS	M	Complete
70	Jill Email Jan 18th	Non-Functional	Efficiency One Energy efficiency retrofits managed by E1 and financed by NS Power; $10K to $100K. Financing is not legislated but part of mandate to work with E1 (Tim Wood, NS Power Regulatory contact). Options for this specific program include: a)LRS will let their customer know they (the LRS) cannot offer this service to customers. b)LRS recommends customer stay with NS Power to continue with this service OR c)LRS can exclude these customers from their recruitment program d)LRS can and will continue this service for customers. Option d) assumes - Outstanding Finance and other charges will be paid out by LRS to NS Power and LRS can assume program participation directly with the customer.	7. Customer Transactions	Billing Customer Care	CIS	M	Complete
71	Jill Email Jan 18th	Non-Functional	Key Accounts Energy Data Portal (SEIS) Provides energy consumption data to commercial and industrial customers. Confirmed this is an option for the LRS to provide this service for their new customers. Options on approach: a)LRS will let their customer know they (the LRS) cannot offer this service to customers. b)LRS recommends customer stay with NS Power to continue with this service. OR c)LRS can and will continue this service for customers.	7. Customer Transactions	Billing Customer Care	CIS	M	Complete

72	Jill Email Jan 18th	Non-Functional	NSP (Customer Solutions) Heating Products Heat pumps, ETS units, and hot water heaters financed on customer's bill. Confirmed this is an option for the LRS to provide this service for their new customers. Options on approach: a)LRS will let their customer know they (the LRS) cannot offer this service to customers. b)LRS recommends customer stay with NS Power to continue with this service c)LRS can exclude these customers from their recruitment program. d)LRS can and will continue this service for customers. Option d) assumes - Outstanding Finance and other charges will be paid out by LRS to NS Power and LRS can assume program participation directly with the customer.	7. Customer Transactions	Billing Customer Care	CIS	M	Complete
73	Jill Email Jan 18th	Non-Functional	NSP (Smart Grid NS Pilot) Battery – Smart Grid NS Pilot Confirmed this is an option for the LRS to provide this service for their new customers. Options on approach: a)LRS will let their customer know they (the LRS) cannot offer this service to customers. b)LRS recommends customer stay with NS Power to continue with this service OR c)LRS can exclude these customers from their recruitment program. d)LRS can and will continue this service for customers. Option d) assumes - Outstanding Finance and other charges will be paid out by LRS to NS Power and LRS can assume program participation directly with the customer.	7. Customer Transactions	Billing Customer Care	CIS	M	Complete
74	Workshops	Functional	LRS customers will be identifiable in systems such as MDMS, ADMS, GIS, MV-90 by the RtR market and the specific LRS entity in which they correspond	1. Identify	Customer Care Load & Revenue Outage Coordination SMOC	ADMS CIS GIS Maximo MV-90	M	Complete
75	Workshops	Functional	RtR Customers with AMI meters when transferred to the RtR market will be updated to reflect their status in the RtR market in CIS and that status change will be communicte to MDMS as part of the current daily-sync between systems	1. Identify	Customer Care SMOC	CIS MDMS	M	Complete
76	Workshops	Functional	RtR customers with MV90 meters when trasferred to the RtR market will be updated to reflec ttheir status in the RtR market in CIS and that status must be communicated to both the MDMS and MV90 systems to be updated manually A report will be written for use in reconcilation across systems	1. Identify	Customer Care Load & Revenue	CIS MV90	M	Complete
77	Nova Scotia Power Regulations - 5.3	Non-Functional	RtR Customers are ineligible from participating in the following alternative billing plans: Equal Billing Plan Group Billing Plan Seasonal Billing	4. Bill	Billing Customer Care	CIS	M	Complete
78	Nova Scotia Power Regulations - 3.6.2	Non-Functional	RtR Customers are ineligible from participating in Net Metering Service	4. Bill	Billing Customer Care	CIS	M	Complete
79	Workshops	Functional	Customers who transition to the RtR market who have been identified as 'Critical Care Customers' for priority in power restoration must continue to be flagged as such an prioritized for power restoration as part of the RtR market	1. Identify	Customer Care	CIS	M	Complete
80	Workshops	Functional	LRS companies, their customers and the relationships between the LRS and their customers must be identifiable in NSP internal systems NSP has elected to identify those customers by using the following attributes Billing Class Rate Code Route	1. Identify	Billing Customer Care Load & Revenue	CIS MDMS	M	Complete
81	Workshops	Functional	The effective dates for a customers status with NSP or any LRS must be maintained in NSP internal systems to facilitate correct billing and reporting on the RtR market	1. Identify	Billing Customer Care Load & Revenue	CIS MDMS	M	Complete
82	Workshops	Functional	The transfer of customers into/out of the RtR market will be facilitated by the completion of connect/disconnect service orders as per standard process. No net-new service orders will need to be created in CIS for the RtR market	1. Identify	Billing Customer Care Load & Revenue	CIS MDMS	M	Complete
83	Workshops 2/2/2024	Functional	If an RTR customer is a tenant of a landlord and leaves the premise, rather than the service to that premise be terminated it will be transferred to the lanlords account but will retain the rate code and route associated with the RtR market. A process and/or report must be in place to monitor these tranfer requests for tenant to lanlord relationships and adjust the rate code and route back to those that correspond to a typical NSP customer	1. Identify	Billing Customer Care Load & Revenue	CIS MDMS	M	Complete

84	Workshops 2/2/2024	Functional	The 'auto-lanlord' function in CIS will not be avaialble for those landlords who join the RtR market. In this case if a tenant of a lanlord leaves a premise, the premsie will not be re-allocated to the lanlords account but rather power would be shut off at that premise if no corresponding connection request is made for that premise	1. Identify	Customer Care	CIS	M	Complete
85	Nova Scotia Power Regulations - 5.2	Functional	If the demand/energy read for the individual customer DT tariff is estimated, the specific DT tariff component of the LRS' bill will be flagged as such	4. Bill	Billing	CIS MDMS	M	In Progress
86	Nova Scotia Power Regulations - 5.2	Functional	A threshold for estimate classification is TBD with respect to EBS, RTT, STT, and OATT calculations Should the number of intervals estimated for a given customer exceed that threshold, the customer in which those were estimated will be flagged on the LRS invoice to indicate estimation has occured	4. Bill	Billing	CIS MDMS	M	In Progress
87	7.3	Non-Functional	NS Power regulations will continue to apply to retail customers part of the RtR market	1. Identify			M	Complete
88	Measurements Canada Specifications 15.3.2	Functional	The demand interval used for determining billing cycle demand reads shall not be less than 15 minutes	3. Aggregate-Calculate	Customer Care SMOC	CIS MDMS	M	Complete
89	UARB Decision June 7th	Non-Functional	The RTT tariff cannot yield a net credit to an LRS for any calendar year. Any given billing cycle may result in a credit to the LRS but the net of that full calendar year must be greater than or equal to zero. Should a LRS have a net credit at the time of their final bill of the calendar year, the LRS will be charged in an amount which would adjust the total net charge under the RTT tariff for the calendar year to zero.	4. Bill	Customer Care Load & Revenue SMOC	CIS MDMS	M	Complete
90	Market Rules Ch4 - 4.3.6	Non-Functional	The LRS must provide an hourly single forecast of net generation injections	2. Collect-Isolate	Load & Revenue SMOC System Controller	MDMS	M	Complete
91	Load 7 Revenue Decision 6/6/2023	Non-Functional	RtR market load will not be excluded from load research curves	1. Identify	Load & Revenue		M	Complete
92	Michael Holldan 2/22/24	Functional	RtR customer meter data must be migrated to the Data Lake to support the requirement for inlclusion in load research data	1. Identify	Load & Revenue		M	Complete
93	System Planning Decision 6/15/2023	Functional	The capacity contribution factors for the SST tariff will be extracted from the 10 Year system outlook report and which is updated annually	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS	M	Complete
94	Load & Revenue direction 6/6/2023	Functional	The Monthly Average System Marginal Cost values will be published by the fuels and imported to MDMS for tariff calculations	3. Aggregate-Calculate	Billing Load & Revenue SMOC	MDMS	M	Complete
95	Jill Email March 8th	Non-Functional	NSP will no longer offer a credit to those RtR customers who desire to participate in the Your Energy Rebate Program (YERP) to receive an HST rebate. Should an RtR customer want to participate int his program they should do so through their LRS the LRS (as the new Energy Supplier) will need to make application to the Your Energy Rebate Program (YERP) and register as a Bulk Vendor to have the rebate applied to your eligible customers	4. Bill	Billing Customer Care	CIS	M	Complete
96	Workshops	Non-Functional	A customers application to join an LRS will be rejected for the following reasons: 1.The customer is a transmission-connected customer and does not have an approved operating agreement in place. 2.Unpaid balances to NS Power - Customer must pay in-arrears balances on their account prior to transitioning to an LRS. 3.The RCTRA form is not completed and signed off correctly by both the customer and the LRS. 4.They are a Municipal Utility and retail customer of the Municipal Utility . 5.They have opted out of an AMI Meter installation – must agree to an AMI meter install at their cost prior to transitioning to an LRS. 6.They are a net-metering customer – must agree to conclude Net-Metering contract with NSP prior to moving to an LRS. 7.They are customers with other hardware requirements (i.e., bidirectional, or backup meter installation) - must agree to installation at their cost prior to transitioning to an LRS. 8.Customers with financing arrangements must conclude that contract prior to transitioning to an LRS – see above.	7. Customer Transactions	Customer Care	CIS	M	Complete
97	LRS TOC 6.2	Non-Functional	NS Power shall have the right to terminate the LRS Participation Agreement and discontinue the LRS Tariffed Services without liability or penalty if at any time the LRS fails to satisfy an of the conditions set out in Section 6.1 of the terms & conditions	4. Bill	Billing Customer Care	CIS MDM MV-90	M	Complete
98	LRS TOC 6.3	Functional	There shall only be one LRS in respect of an RtR Customer Premises at any given time	1. Identify	Customer Care Load & Revenue LRS SMOC	CIS MDMS	M	Complete
99	LRS TOC 6.4	Functional	There shall only be one RtR Customer for any RtR Premises at any given time	1. Identify	Customer Care Load & Revenue LRS SMOC	CIS MDMS	M	Complete

100	LRS TOC 8.1	Non-Functional	LRS Responsibilities: (a) the procurement of electricity from qualified low-impact renewable electricity generators; (b) acquiring the services delivered under, and remaining in compliance with, the OATT, Energy Balancing Service Tariff, Standby Service Tariff and the Renewable to Retail Market Transition Tariff; (c) payment to NS Power of all fees and charges for the LRS Tariffed Services (d) payment to NS Power of all DT charges applicable to the LRS's RtR Customer(s); (e) adhering to the Credit Assurance requirements of NS Power as described in Section 18 (f) obtaining and providing the RtR Customer's written consent, in a form acceptable to NS Power, in support of any transaction requests submitted to NS Power on behalf of the RtR Customer; g) obtaining any consents from the RtR Customer required by NS Power with respect to the use or disclosure of Customer Information (h) providing NS Power, in a timely manner, with up-to-date RtR Customer Information for all RtR Customers served by the LRS (i) acting as the point of contact for RtR Customers served by the LRS on all matters related to billing and collection of accounts	1. Identify	Customer Care Load & Revenue LRS SMOC	CIS MDMS	M	Complete
101	LRS TOC 9.1	Non-Functional	The LRS shall enter into a contract with each of its RtR Customer(s) with respect to any sale of renewable low-impact electricity by the LRS to such RtR Customer Contract	1. Identify	LRS		M	Complete
102	LRS TOC 9.6	Non-Functional	The LRS shall ensure that each RtR Customer Contract contains an acknowledgement from the RtR Customer that the RtR Customer will revert to NS Power's Bundled Service upon discontinuance of LRS Tariffed Service and the termination of the LRS Participation Agreement unless an RtR Customer Transaction Request Application has submitted by an alternate LRS on behalf of the RtR Customer to NS Power nominating an alternate LRS	1. Identify	Customer Care LRS	CIS	M	Complete
103	LRS TOC 10.2.1	Non-Functional	NS Power shall have the right to suspend or interrupt the delivery of Distribution System Access or any or all of the LRS Tariffed Services for the purpose of safeguarding life or property, for making repairs, changes, renewals, improvements or replacements to the Transmission System or Distribution System provided NS Power shall make Reasonable Efforts to ensure all such interruptions or suspensions are of a minimum duration consistent with the exigencies of the case. Further, provided, however, any such interruption or suspensions shall not release the LRS from its obligation to pay all charges pursuant to any NS Power tariffs applicable to the LRS Tariffed Services, or otherwise owing to NS Power under the LRS T&Cs, including the DT Charges, during the period of any such suspensions.	4. Bill	LRS System Operator		M	Complete
104	LRS TOC 13.1.1	Non-Functional	NS Power will install and seal all revenue class meters for the purpose of measuring the output of the LRS's generation resources and the RtR Customer's load as necessary for application of the applicable NS Power tariffs. Meter data from such meters will be used for Load Settlement for the purpose of determining the charges for the LRS Tariffed Services. The meters will also be used to determine charges for Distribution System Access under the Distribution Tariff.	2. Collect-Isolate	Load & Revenue LRS SMOC	CIS MDMS MV-90	M	Complete
105	LRS TOC 13.1.2	Non-Functional	Interval meters with remote polling capability shall be installed for all RtR Customers. NS Power will charge the costs of the supply and installation of metering devices and communications equipment and services which are incremental to the metering requirements applicable to NS Power's Bundled Service. Metering for LRS generation resources (whether owned or contracted) will be provided in accordance with the applicable Generator Interconnection Agreement.	2. Collect-Isolate	Load & Revenue LRS SMOC	CIS MDMS MV-90	M	Complete
106	LRS TOC 13.2.1	Functional	NS Power shall use Reasonable Efforts to obtain a meter reading for each RtR Customer Premises in accordance with NS Power's meter reading cycle. If NS Power is unable to obtain a meter reading, the amount of power and energy used by the RtR Customer in the Billing Period shall be estimated by NS Power.	3. Aggregate-Calculate	Load & Revenue LRS SMOC	CIS MDMS MV-90	M	Complete
107	LRS TOC 13.2.2	Functional	At the request of the LRS, NS Power shall use Reasonable Efforts to obtain an actual meter reading at a time other than the regularly scheduled meter reading. NS Power will charge the LRS for additional meter reading expense in accordance with NS Power Regulation 7.1 - Schedule of Charges.	3. Aggregate-Calculate	Load & Revenue LRS SMOC	CIS MDMS MV-90	M	Complete

108	LRS TOC 15.1	Non-Functional	In the event a Licenced Retail Supplier fails, for any reason other than a billing dispute as described below, to make payment to NS Power on or before the due date as described in Section 14.5.6, and such failure of payment is not corrected within thirty (30) Calendar Days after NS Power notifies the LRS to cure such failure, a default by the LRS shall be deemed to exist. Upon the occurrence of such a default by the LRS, NS Power may discontinue the LRS Tariffed Services and terminate the LRS Participation Agreement without any liability or responsibility whatsoever, except for obligations arising prior to the date of termination.	4. Bill	Billing Load & Revenue LRS Risk Management	CIS MDMS MV-90	M	Complete
109	LRS TOC 15.2	Non-Functional	In the event of a billing dispute between NS Power and the LRS, NS Power shall continue to provide LRS Tariffed Services as long as the LRS (i) gives written notice of the dispute to NS Power on or before the due date for the payment, detailing the amount and reasons for the dispute; (ii) continues to make all payments not in dispute, and (iii) prior to the due date for payment pays into an independent escrow account the portion of the invoice in dispute, pending resolution of such dispute. If the Licenced Retail Supplier fails to meet these three requirements for continuation of service, then NS Power may provide notice to the Licenced Retail Supplier of its intention to discontinue the LRS Tariffed Service and terminate the LRS Participation Agreement in thirty (30) Calendar Days	4. Bill	Billing Load & Revenue LRS Risk Management	CIS MDMS MV-90	M	Complete
110	LRS TOC 16.2	Functional	Upon discontinuance of LRS Tariffed Service and the termination of the LRS Participation Agreement, and in the absence of an RtR Customer Transaction Request Application accepted by NS Power requesting the RtR Customer be assigned to an alternate LRS, the provision of Bundled Service to the affected RtR Customers(s) shall be assumed by NS Power as the default supplier, in accordance with NS Power's Regulations.	7. Customer Transactions	Billing Customer Care Load & Revenue LRS Risk Management	CIS MDMS MV-90	M	Complete
111	Workshops	Functional	Any new RtR customer will have a new account created for them and a net-new account created for each subsequent LRS they join. Their NSP account will be closed and customer will only ever have a single active account at any given point	1. Identify	Billing Customer Care	CIS MDMS MV-90	M	Complete
112	Workshops	Functional	The CIS system must have rate codes to categorize each LRS customer into the following categories and communicate these rate codes to the metering systems (MDMS, MV-90) Domestic (Including TOD but variable rates are not eligable for RtR) Small General General General – Transmission Large General Large General - Transmission Small Industrial Small Industrial – Transmission Medium Industrial Medium Industrial – Transmission Large Industrial Large Industrial - Transmission Outdoor Recreational Lighting All Unmetered Services	1. Identify	Billing Customer Care Load & Revenue SMOC	CIS MDMS MV-90	M	Complete
113	Workshops	Functional	LRS entities will have a Customer Record created with distinct accounts for the following functions: 1.N number of accounts for each of the business offices affiliated with the LRS (configured as if they were a customer of the LRS) 2.N number of accounts for each of the generator sources affiliated with the LRS 3.A single account per LRS to act as the billing account for the LRS	1. Identify	Billing Customer Care Load & Revenue SMOC	CIS MDMS MV-90	M	Complete
114	Workshops	Functional	LRS charges recorded in CIS will be communicated to NSP financial system of record - Oracle and be reconciled between the two systems	4. Bill	Billing	CIS Oracle	M	Complete
115	Workshops	Functional	The CIS system will have a dedicated revenue code associated with the corresponding Oracle-Finance GL for each of the required rates per the RtR market The new GLs will have their 25-digit versions created for oracle, their 15-digit versions created for CIS and mapping setup between the equivalent Oracle and CIS GL codes.	4. Bill	Billing	CIS Oracle	M	Complete
116	Workshops	Functional	All data communicated to a LRS must first be encrypted prior to submission	5. Transfer	Billing Customer Care Load & Revenue	CIS MDMS	M	Complete

117	Workshops	Functional	The CIS system must continue to receive energy and demand readings from MV-90 and MDMS for use in the distribution tariff for those RtR customers	3. Aggregate-Calculate	Billing Customer Care Load & Revenue SMOC	CIS MDMS MV-90	M	Complete
118	Workshops	Functional	NSP metering system must retain both delivered and received metering channels for both LRS generators and their customers for use in the determination of RtR tariff quantities	3. Aggregate-Calculate	Billing Customer Care Load & Revenue SMOC	CIS MDMS MV-90	M	Complete
119	Workshops	Functional	RtR generators will have their delivered and received channels netted for the purpose of isolating their generation from the residual consumption for operation. The netted result will be used in tariff quantity determination	3. Aggregate-Calculate	Billing Customer Care Load & Revenue SMOC	CIS MDMS MV-90	M	Complete
120	Workshops	Functional	The RCTRA form must include a check box to indicate if the customer has a metering setup requiring a bidirectional meter, in order to indicate the necessity to facilitate installation of a bi-directional meter at the customer's premises.	7. Customer Transactions	Customer Care	Salesforce Webform (TBD)	M	In Progress
121	P. Green	Functional	Create a time recording process to record and report on all NSP labour per LRS required to administer and support all activities related to the operations of a LRS.		Finance	Oracle Financials	M	Not Started
122	NSP Regulations 2.1	Functional	NSP has the right to refuse customers for the following reason(s). This also applies to those customers leaving the service of an LRS with intent to return to NSP as a customer a) the person applying for electric service has an outstanding electric service account and satisfactory arrangements for settlement have not been made, or (b) the person applying is an agent for another person, and that other person has an outstanding electric service account and satisfactory arrangements for settlement have not been made, or (c) an occupant of the premises has an outstanding account incurred when occupying any premises at the same time as the person applying for service and satisfactory arrangements for settlement have not been made.	7. Customer Transactions	Customer Care	CIS	M	Complete
123	Workshops March 6th	Functional	Should a meter change occur to a RTR customer (For any reason), start/end reads for both meters will be captured for the specified billing period. The DT will be based on the total energy of the combined two meters. Interval data associated with both meters for the billing period must be considered for the EBS, RTT, STT, and OATT tariffs	4. Bill	Billing Customer Care	CIS MDMS	M	Complete

Request IR-2:

Please confirm under the Board's decision in M11874, if the RtR market fails, NS Power would expect to recover the outstanding balance of costs associated with this project from its ratepayers.

(a) Has the licensee provided any financial security to guarantee recovery of any portion of project costs?

(b) Please provide a forecast of cost recovery for project costs assuming Renewall's current forecast of customer participation as NS Power best understands it.

(c) Please identify whether there is any shortfall in cost recovery under the assumptions used in the response to part (b).

(d) Please provide the percentage of costs forecast to be recovered from residential and each other class of customers, as understood by NS Power at this time based on the response to part (b).

(e) If the RtR market does not begin service at any time, please explain how the assets created by the proposed projects would meet the test of being used and useful.

Response IR-2:

Confirmed. As noted in the Board's decision in M11874:

> NS Power's prudently incurred RtR implementation costs, tracked in a deferral account, are recoverable through tariffs pursuant to the Annually Adjusted Rates

process. If it turns out that this is not possible because the RtR market fails, any balance outstanding can be addressed in a general rate application.[1]

(a) No. As noted in the Board's April 9, 2025 Decision letter regarding M11874:

> The Board has determined that Renewall should not be required to provide a letter of credit, or similar security, for NS Power's RtR market implementation costs at this time. In the Board's opinion, the preferred method to recover these costs is through RtR tariffs as NS Power originally proposed.[2]

(b-d) A forecast of cost recovery has not been developed. It is anticipated this will ultimately depend on the total RtR market support costs to be recovered (of which the project is one element), market take-up and timing and number of LRS active in the market. As well, a determination as to the tariff mechanism to be applied will be required (e.g. RtR EBS or Standby Service tariffs). Work on this has not been undertaken to date.

(e) NS Power would need to make the assessment of the assets if this scenario were to occur. If the assets were determined to be not used and useful, NS Power expects Accounting Policy 6350 would be applied and costs would be recovered in accordance with this policy. The assets being deemed not used and useful would not restrict NS Power's ability to recover these costs. As stated in the NSEB decision in M11874:

> Based on the reasoning about s. 3G(2)(b) of the *Electricity Act* discussed earlier in this letter, in the Board's opinion, NS Power is not precluded from recovering RtR implementation costs from its ratepayers. If it turns out that the Board-sanctioned method used to balance the competing interests expressed in the *Electricity Act* does not result in full recovery, the Board sees no reason in principle why a mechanism could not be developed for cost recovery, provided the implementation costs are prudently incurred.[3]

[1] M11874, NS Power Application for Renewable to Retail Implementation Costs, Board Decision, April 9, 2025, page 6.
[2] Ibid.
[3] M11874, NS Power Application for Renewable to Retail Implementation Costs, Board Decision, April 9, 2025, page 5.

Request IR-3:

Please explain how (a) expenses and (b) future capital expenditures related to the management of metering interval data, billing functions, tariff maintenance, etc. will be allocated and recovered in rates (p. 1-2).

Response IR-3:

It is the Company's expectation that retail customer metering and billing costs will be allocated in accordance with the cost-of-service process, described in 2026-2027 GRA SR-01 Attachment 01a (M12451) and recovered through the RtR Distribution Tariff.

With respect to the management of metering interval data, billing, and maintenance functions required to support the Licensed Retail Supplier's (LRS) data management and billing processes, it is anticipated these costs will be recovered through the tariffs applicable to the LRS (the Energy Balancing Service Tariff and Standby Service Tariff) but this remains subject to change as RtR market development and potential changes to the Nova Scotia Independent Energy System Operator (IESO-NS) role in this market become clearer and the path to timely and complete recovery of these costs from the LRSs active in the market becomes known.

Request IR-4:

Has the current RtR licensee been involved in the development of this project, in particular the increase in the budget estimate (p. 2)? If so, please provide a general overview of that engagement, including a timeline of when the RtR licensee was informed about changes in the requirements that resulted in the price increase.

Response IR-4:

As NS Power has obligations to comply with the applicable legislation as mandated under section 3G (now section 22) of the *Electricity Act*, it retains authority for the work execution and scope of this project. NS Power has informed and collaborated with the Licensed Retail Supplier (LRS) consistently throughout the implementation project and, as referenced in the response provided in REI IR-21 related to upcoming anticipated changes in scope specifically initiated by the LRS, NS Power and Renewall Energy Inc. (REI) agreed to a decision request/change request (DR/CR) process for scope, schedule, or cost impacting items related to those areas that had not previously been included in the project cost estimate.

Additionally, REI has been involved with the overall project through attendance of bi-weekly meetings with the project team which commenced on May 16, 2023. These meetings were established to communicate project status and an attempt to align NS Power project delivery and REI's technology implementation approach. In April 2025, REI and NS Power agreed that because the project team had completed all business process and technical set up work possible ahead of final LRS commissioning and Commercial Operation Date (COD,) and in order to minimize additional costs to the project, the project team would not continue work on this initiative until seven months prior to the LRS' first retail sales are confirmed, aligning with the remaining project scope duration. At that time, NS Power and REI agreed to reduce the bi-weekly meeting cadence to monthly.