



Ontario Energy Board | Commission de l'énergie de l'Ontario

BY EMAIL AND WEB POSTING

March 10, 2022

To: All Licensed Electricity Distributors
All Other Interested Parties

Re: **2022 Annual Reporting and Record-keeping Requirements and Enhancements to the Electricity Distributor Yearbooks**

The Ontario Energy Board (OEB) is pleased to provide this summary of improvements to the Reporting and Record-keeping Requirements (RRR) for licensed electricity distributors. With a view to streamlining the filing process, a number of changes to the RRRs have been made and the useability of the filing portal is further refined. The annual RRR input forms for completing the filings are now available in the [RRR Filing portal](#). The OEB has also determined that the filing date for RRRs is extended to **May 2, 2022** in recognition of the April 30 deadline falling on a weekend.

In keeping with our strategic goals and recognizing that the Minister's [mandate letter](#) highlights the importance of modernizing and streamlining process to reduce regulatory burden, the OEB has continued its internal RRR Stewardship program. Through our Stewardship program, staff has identified a number of improvements to reduce the level of time and effort needed to file the RRR data. This program of RRR review is ongoing and will involve stakeholder input and discussion, with more details to follow soon.

The RRR improvements are summarized below and, in many cases, reflect direct feedback from distributors to OEB staff. This is particularly the case for RRR requirements to support Activity and Program-based Benchmarking ([APB](#)). The additions to RRRs to facilitate APB will also improve filing requirements for distributors' rate applications. The goal is to reduce the overall amount of information distributors need to file which is described below. A key part of the Stewardship review is to look for opportunities to make use of RRR information in rate applications and reduce the burden in filing requirements.

Reductions to RRR and Enhancements to the Portal

Improvements at this time include reduction of reporting requirements, expanding the capability of reporting for some distributors to alleviate work during the IRM rate-setting process, and general system portal improvements to reduce the time and level of effort required to file the RRR data.

RRR 2.1.2 Reporting on Customer Numbers

In a previous [letter](#) the OEB eliminated quarterly filing requirements and distributors are now required to file just once, annually. To streamline the overall filing of RRR, the reporting due date is now the end of April to align with all other annual RRR requirements.

Improvements to Filing Process and User Interface

As a result of the alignment of 2.1.2 with all other annual filings, users will now find a new home page in the portal, which more clearly lists each section of RRR and identifies their submission status for at-a-glance completion monitoring. Another improvement, made to various sections throughout enables users to remove uploaded files and replace them with a new version, without needing to contact OEB staff. This should save time and effort for both filers and OEB staff when completing sections that require file uploads.

RRR 2.1.7 Improved Reporting for Group 1 sub-accounts by Rate Zone

In a previous [letter](#) the OEB announced that distributors would now have the option to report Group 1 accounts by rate zone in the RRR 2.1.7 Trial Balance to alleviate reconciliation work and save distributors time during the IRM rate-setting process. This option is now expanded to the sub-accounts of any applicable Group 1 account.

Error Proofing Data on Input

Upgrades to sections 2.1.8, 2.1.9, and 2.1.16 of the filing system improve error notifications when data issues are detected. This includes notification of suspected data errors upon exit of fields, improving the error messaging to be more specific, and providing users with a list of suspected errors within that section at the bottom of the form to review and fix before submission.

By ensuring that data for this section is accurate before submission, these enhancements are expected to save OEB staff and distributors time by eliminating data validation efforts after RRR submission and before Scorecard publication.

RRR 2.1.20 Publicly Traded Securities (PTS)

The OEB required the 2.1.20 filing by distributors in December 2021, and therefore will not require distributors to complete 2.1.20 as part of the 2022 RRR submission.

Additions to RRR

A new data point is included in the section regarding LEAP information. While as noted above, a new section of RRR has been added in light of recent APB framework improvements.

RRR 2.1.16 LEAP Reporting

In a previous [letter](#) the OEB made an adjustment to distributors' 2021 cost assessment invoices. The data field "Supplement to LEAP from Cost Assessment Offset" is added for distributors to enter the amount of supplemental funds added to LEAP in 2021 as a result of the cost assessment offset.

RRR 2.1.5.8 Activity and Program-based Benchmarking (APB)

As part of EB-2018-0278 the OEB issued a [letter](#) outlining improvements to the APB framework and the data points required to support the calculations on an ongoing basis. The OEB is now adding those data points to RRR so that distributors can submit these on an ongoing basis.

The new RRR filing requirement includes a fixed asset continuity schedule which the OEB intends to leverage to reduce the filing requirements for other regulatory processes. Once distributors report these schedules as part of RRR submissions, to the extent that information is required in a subsequent rate application, they will be prepopulated by OEB staff on behalf of the applicant into the applicable application models to reduce any duplication of effort. Based on input gathered through the APB consultations, the OEB understands that information provided in this schedule is readily available after financial statements are finalized each year. Stakeholders have indicated that providing most of this information annually through RRR is lower in effort given the nature of the information but that some new processes may need to be put in place, such as tracking the difference between number of meters purchased and number of meters installed.

The data points outlined below have been added to RRR as section 2.1.5.8 and have been added to the filing system for the 2022 filing of fiscal 2021 information. Similar to the historic data ask made in the OEB's February 25, 2022 letter, a template has been created which distributors will download from the filing system, populate with the required data, and upload back to the filing system. This approach of uploading a

template, as already done for 2.1.4.2 and 2.1.7, helps to reduce filing effort by avoiding manual entry of data directly into the system.

- Fixed Asset Continuity Schedule (Analogous to Appendix 2-BA from the OEB's Chapter 2 Filing Requirements Appendices)
 - This will provide the APB models with the needed capital additions information and can be used to reduce filing requirements during cost of service applications
- Quantity of equipment installed for the following asset classes
 - Poles, Towers and Fixtures (corresponding to USoA 1830 additions)
 - Line Transformers (corresponding to USoA 1850 additions)
 - Meters (corresponding to USoA 1860 additions)
- General system information
 - Number of stations – for unit cost and econometric models
 - Number of station transformers – for econometric models
 - MVA of station transformers – for unit cost and econometric models
 - Total number of poles – for unit cost and econometric models
 - Total number of line transformers – for econometric models

The [RRR Filing portal](#) is now open for the Annual RRR submissions by electricity distributors and the deadline to complete their RRR submissions is **May 2, 2022**.

Any questions relating to this letter should be directed to performance_reporting@oeb.ca.

Yours truly,

Original Signed By

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