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February 8, 2011

Darrell Nitschke, Executive Secretary  
North Dakota Public Service Commission  
State Capitol Building, Dept. 408  
600 East Boulevard  
Bismarck, ND 58505-0480

RE: XCEL ENERGY BILLING AND METERING REVIEW  
CASE NO. PU-08-627 AND CASE NO. PU-09-94

Dear Mr. Nitschke:

Attached is an original and 5 copies of the Revenue Cycle Process Review Action Plan (“Action Plan”) update for Northern States Power Company (“Xcel Energy”). We provided copies of this update to the Commission at our January 25, 2011 Periodic Information Exchange meeting. However, the Commission requested that we formally submit the document so it can be included in the record and the Commission can consider closing the related dockets.

In summary, our Action Plan responds to recommendations made by Global Enterprise Managers (“GEM”), who performed an external review of our overall metering and billing processes in 2009. Please note that we have structured our update report around GEM’s three primary recommendations, providing a summary of our actions for each of the corresponding detailed action recommendations.

While we would be glad to provide the Commission future updates of our metering and billing performance, we are hopeful that the process improvements and performance results we presented on January 25, along with this update, provide the Commission the necessary assurance that the open dockets related to this issue can now be closed (Case No. PU-08-627 – Meter Malfunctions Investigation and Case No. PU-09-94 – Billing and Metering Review).

Please contact me if you have any questions or comments.

Sincerely,

DAVID H. SEDERQUIST  
SR. CONSULTANT, REGULATION/FINANCE

Enclosures



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**Revenue Cycle Process Review Action Plan**

***Status Update  
1/25/2011***

*Prepared for  
North Dakota Public Service Commission*

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1

*Please note that the Action and Alternate or Related Action Description columns are direct references from the September 16, 2009 Final Report from Global Enterprise Managers. Additionally, the dates provided in the Timeline column are current targets and subject to change, as appropriate.*





## Revenue Cycle Process Review Action Plan

Action	Alternate or Related Action Description	Process Leader	Action Plan Steps	Timeline (by when)
listed in Exhibit 4-1 of this report on a monthly basis for a base-lining period of one year.		Regulatory Business Systems	monthly results, beginning with August 2009 data.  Results to be provided to Regulatory and maintained in a shared directory.	will be reported on 9/17/2009.  Ongoing results will be reported on the 19 <sup>th</sup> of each month beginning in Q4 2009.  Completed and <i>ongoing</i> .
3) In addition to using [the] measures [in Exhibit 4-1] as immediate indicators for process improvement, select the factors with the largest influence on billing accuracy as reference values from which to define annual improvement targets, and continue to measure the remaining factors internally to Xcel to reduce the chance that unexpected changes in performance will go undetected.		Billing	Analyze data each month and quarter.  Identify most influential measures.  Determine annual improvement targets for identified measures.	Timing tied to Actions #1 and #2 above. Completed  Within 90 days following the initial 12 month tracking period.  <i>August 2011</i>  <i>Measures and targets are currently in place; 12 month tracking in progress.</i>
4) Align business unit and sub-process goals with an overall revenue process billing accuracy improvement objective by means of the individual billing accuracy factors summarized in Section	Align organization, process, and process performer performance improvement goals with the overall revenue cycle billing accuracy improvement goals described in Section 4, Billing Accuracy and Service Quality.	Revenue Cycle Process Owners Human Resources Communications	Identify one or two scorecard goals that would be carried on the following organization's scorecards: <ul style="list-style-type: none"> <li>• Builders Call Line</li> <li>• Metering</li> <li>• Meter Reading</li> </ul>	Develop common goals by January 2010. Completed All Revenue Cycle organizations adopted the



## Revenue Cycle Process Review Action Plan

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4.			<ul style="list-style-type: none"> <li>• Billing</li> <li>• Regulatory</li> <li>• Call Center</li> </ul>	following three 2010 IPAD goals: 1. Cancel Rebill Lag 2. % Bills Error Free 3. % of Eligible Revenue Billed On Time  December 2010
5)	Document the full set of revenue cycle controls in a comprehensive Quality Assurance plan.	Revenue Cycle Process Owners Audit Services SOX PMO	Identify and preload IPAD performance goals that will link to scorecard goals.  Implement goals with a consistent message across organizations.  Review and operationalize reward & recognition program to determine applicability.	February 2010 Completed  March 2010 Completed  October 2009 Completed  July 2010  July 2010 <i>Completed preliminary reviews of the proactive measurements that</i>



## Revenue Cycle Process Review Action Plan

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				<p><i>support the billing accuracy scorecard. In almost all cases, we have existing measurements in place; in the process of developing a few new ones.</i></p> <p><i>*Timing for this item is tied to Action Items 6 &amp; 7 below</i></p>
6) Ensure that all of the sources of billing inaccuracy listed in Exhibit 4-1 of this report are included in the set of revenue cycle controls.		Revenue Cycle Process Owners Audit Services SOX PMO	Integrate Exhibit 4.1 items into revenue cycle controls.	December 2010 (See #5 above)
7) Ensure, either by the Internal Audit group or another independent Quality Assurance group, that the controls are being regularly tracked and promptly acted upon by the appropriate business group.		Revenue Cycle Process Owners Audit Services SOX PMO	Develop a comprehensive Plan that appropriately monitors the ongoing business area application of the QA Plan.	<p>June 2010 <i>Key internal controls identified and documented.</i></p> <p>September 2010 <i>In process of developing a QA plan (with appropriate monitoring schedules). (Also See</i></p>



## Revenue Cycle Process Review Action Plan

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8) [Make] a set of measurements related to potential sources of billing inaccuracy selected from those described in Section 4.2 [...] available to regulatory agencies and external advocate groups on a regular basis in the form of new service quality metrics.		Revenue Cycle Process Owners  Regulatory	Develop the evaluation schedule.  Implement the monitoring plan.	#5 above  January 2011
			Provide monthly reports to Regulatory area.  Participate as appropriate in Regulatory Agency discussions regarding ongoing external reporting specifics and timing.	Beginning with Q4 2009 results  Per Regulatory Agency timing  Completed and ongoing

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## Revenue Cycle Process Review Action Plan

### Recommendation 2 – Improve AMR performance through Cellnet and Xcel process changes (Actions 9-17)

Action	Alternate or Related Action Description	Process Leader	Action Plan Steps	Timeline (by when)
9) Conduct discussions with Cellnet to seek mutually agreeable modifications to the Cellnet field support work agreement to add successful radio frequency (RF) communication of electric and natural gas meter readings as a goal for meter maintenance. This could result in meter de-automation and some meters being placed on manual read cycles if viable RF communication of electric or natural gas meter readings cannot be achieved, but the net result will be a reduction in repeated field work and an improvement in billing accuracy.	Conduct discussions with Cellnet to seek mutually agreeable modifications to the Cellnet field support work agreement that define outcome-based maintenance goals. The resolution of the problem and the time to complete the actions should be balanced to ensure that the field work does not create unnecessary repeat work and adversely affect the billing process.  Conduct discussions with Cellnet to seek mutually agreeable modifications to the Cellnet field support work agreement to improve root cause analysis of missed meter reads.	Metering  Meter Reading	1. Leverage the November 2010 dispute resolution processes to negotiate enhancements related to GEM referenced recommendations.  2. Implement six process improvements that were specific to the GEM findings	October/ November 2010 (Change Order Complete)  June 2010 <i>Process improvements resulting from change orders applicable to this action implemented per change order schedule, specifically associated with network verification, field work verification, and service quality service improvement items.</i>
10) Ensure that the additional internal random and period testing and RMA testing and tracking on failed integrated electric meters and modules is designed to predict integrated meter/module trends, since the long-term performance and potential failure modes of these measuring devices are not yet well established.		Meter Engineering  Metering	Verify that non-mechanical meters for purposes of random and periodic testing are identified as separate lots.  Complete identified annual random and periodic testing for non-mechanical lots.  <u>Module Testing (Removed from Field)</u>	December 2009 (Complete random and periodic testing) Completed  June 2009 (Cellnet RMA process implemented) Completed  October 2009 (Xcel RMA process

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## Revenue Cycle Process Review Action Plan

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11) Ensure that the two-way Cellnet AMR system equipment that will be deployed in the final phase of the Cellnet automation project has passed rigorous first article testing that accounts for the increased communication complexity of peer RF communications among modules.			<p>Implement negotiated Cellnet Returned Material Analysis (RMA) and ensure process separately identifies non-mechanical electric meter types or models.</p> <p>Utilizing Cellnet RMA data develop predictive failure information for non-mechanical electric meters.</p> <p><u>Meter Testing (Removed from Field)</u></p> <p>Review and adjust as necessary the Xcel RMA processes to ensure that non-mechanical meters are being adequately tested and reported.</p>	<p>reviewed) Completed</p> <p>October 2009 (Cellnet predictive failure analysis implemented) Completed</p>
		Meter Engineering Metering	Leverage the current one-way first article testing process to build the success criteria for two-way first article testing ensuring contractual obligations are met.	<p>December 2009 (Finalize two-way First Article Test plans and criteria). Completed</p> <p>December 2009 (Cellnet to deliver to Xcel Energy all necessary equipment and software and documentation for first article testing) Completed</p> <p>June 2010 (First</p>



## Revenue Cycle Process Review Action Plan

Action	Alternate or Related Action Description	Process Leader	Action Plan Steps	Timeline (by when)
				<p>Article Testing to be completed per established schedule)</p> <p><i>Two-way first article testing is progressing. Metrology and network testing was completed satisfactorily for residential meters. Phased-in residential deployment expected to begin late August 2010.</i></p> <p><i>Testing of C&amp;I two-way meters. (Advanced continues with results expected in October 2010. If satisfactory metrology and network results are achieved, phased-in deployment is anticipated prior to year-end.)</i></p>



## Revenue Cycle Process Review Action Plan

Action	Alternate or Related Action Description	Process Leader	Action Plan Steps	Timeline (by when)
12) Although it would require renegotiation of the Cellnet deployment contract and changes to the target date for full AMR deployment, Xcel should explore the possibility of a pilot field test of the two-way Cellnet AMR system equipment through a full set of seasons in Xcel's demanding environment before embarking on full deployment of this new technology. Such a pilot would assess physical performance of the equipment, RF communication performance, and overall reliability of readings to verify end-to-end performance under field conditions. GEM recognizes that restructuring this phase of the Cellnet deployment into a pilot presents a difficult challenge, and recommends if a pilot is not undertaken, then at a minimum Xcel should review the new technology for potential failure modes and confirm that the internal Xcel processes and data systems will promptly recognize/address these failures.		Metering Meter Reading	Leverage the November 2010 dispute resolution processes to negotiate enhancements related to GEM referenced recommendations.  Based on two-way pilot decisions, implement as necessary in-field testing component of First Article testing.	October/ November 2010 (Change Order Complete) Completed  March 2010; co-incident to first article testing of two way. <i>In Progress.</i> <i>The metrology and network components of the two-way first article testing for residential and C&amp;I equipment simulates both lab and in-field testing. Thus eliminating the need to undertake an additional pilot. At this time the scope of the two-way implementation will be minimal (i.e. less than 10,000 meters across NSPM).</i>
13) Complete and formalize receipt sampling and test processes for the AMR modules that Xcel receives with most new meters.		Meter Engineering Metering	Review and adjust as necessary the Xcel new meter sample testing processes.  As necessary obtain module testing equipment.	June 2009 (Complete review and implement) Completed  October 2009



## Revenue Cycle Process Review Action Plan

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14) Continue to update the types of “safety nets” that are in place to identify and efficiently remediate metering and meter reading problems when they occur. The issues of repeated readings that began in late 2007 and 2008 were not caught quickly by the CRS billing stop bill checks, consecutive estimate checks, or zero usage checks. When every meter was actually observed by a meter reader, certain types of failures and field conditions could be detected and reported more quickly. With AMR, a problem consumption pattern must be identified in the data processing systems.		Billing	Perform root cause analysis on a monthly basis on various exceptions to the Stop Billing Rules, Interface Exchange Handling, and Special Reporting.  Identify common patterns and event triggers.  Develop and implement enhancements/“safety nets” to prevent future occurrences.	(Obtained necessary equipment) Completed  Monthly beginning January 2009  Completed and ongoing  <i>Completed and ongoing Initiatives underway for 2010:</i> - Monthly Red/Yellow/Green review on Stop Billing Rules; - IEH; - PTJs; - Tightening of the Stop Billing Rule parameters.
15) If natural gas meters continue to be damaged, adopt at least one of the following three paths: <ul style="list-style-type: none"> <li>▪ Realizing that these failures will occur, continue to enhance processes to detect and fix the failures on an expedited basis and understand the root causes of the</li> </ul>		Metering  Meter Engineering	<u>Zero Consumption Detection (ZCD) Process</u> Continue to utilize and enhance as necessary to gas ZCD process.  <u>Field Order Completion</u> Develop reporting to monitor and ensure timely field response	March 2009 (enhanced ZCD detection process implemented) Completed  June 2009 (Field order completion



## Revenue Cycle Process Review Action Plan

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<ul style="list-style-type: none"> <li>▪ failures.</li> <li>▪ Work with both Cellnet and natural gas meter manufacturers to find a more appropriate match between the quality and robustness of the module mechanical components and the meter register and internal gear construction.</li> <li>▪ If significant mechanical issues persist with Cellnet AMR modules on natural gas meters, evaluate the possibility of utilizing a different module/register interface approach for natural gas meters that does not make the same mechanical interface tradeoffs between damaging the module and damaging the meter.</li> </ul>			<p>by Cellnet and internal crews to meter orders.</p> <p>Complete identified annual random and periodic testing.</p> <p><u>Module Testing (Removed from Field)</u></p> <p>Implement negotiated Cellnet Returned Material Analysis (RMA).</p> <p>Develop predictive failure information, using Cellnet RMA data.</p> <p><u>Meter Testing (Removed from Field)</u></p> <p>Review and adjust as necessary the Xcel RMA processes to ensure that gas meters are being adequately tested and reported.</p> <p><u>Cellnet Agreement</u></p> <p>Leverage the November 2010 resolution processes to negotiate enhancements related to GEM referenced recommendations.</p>	<p>reporting implemented) Completed</p> <p>June 2009 (Cellnet RMA process implemented) Completed</p> <p>September 2009 (Xcel RMA processes reviewed) Completed</p> <p>November 2009 (Change Order complete) Completed</p> <p>March 2010 (Change Order process enhancements implemented) Completed</p> <p>November 2009 Completed</p>
16) Establish goals for investigating and determining root cause for meters on		Metering	Incorporate Lost Meter monitoring into metering area	October 2009 (add to area scorecards)



## Revenue Cycle Process Review Action Plan

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the Lost Meter report. The Lost Meter report lists meters that are providing automated readings but that are not known to Xcel's information systems.			<p>scorecards and utilize existing processes to conduct investigations.</p> <p>Leverage the 1074 and 5-dial dispute resolution processes to negotiate enhancements related to GEM referenced recommendations.</p> <p>Establish a team to review</p> <p>Lost Meter results and implement recommendations to improve performance.</p>	<p>Ongoing (use existing processes to conduct investigations) Completed</p> <p>November 2009 (Change Order Complete) Completed</p> <p>December 2009 (Identify process improvement opportunities) Completed</p> <p>March 2010 (Implementation of change order process enhancements) Completed.</p> <p><i>Lost meter monitoring and reporting in place; Addtl'l field personnel engaged in the field investigations to ensure meters are found and billing properly. Performance metrics established. Improvements gained.</i></p>



## Revenue Cycle Process Review Action Plan

Action	Alternate or Related Action Description	Process Leader	Action Plan Steps	Timeline (by when)
17) Implement an AMR Natural Gas Meter assessment program to find and repair meters that are under-reporting usage due to register/module interface slippage.		Metering Meter Reading Meter Engineering	<p><u>In-Service Meters Testing Program</u> Complete identified annual random and periodic testing for non-mechanical lots.</p> <p><u>ZCD Process</u> Continue to utilize and enhance as necessary to gas ZCD detection process.</p> <p><u>Field Order Completion</u> Develop reporting to monitor and ensure timely field response by Cellnet and internal crews to meter orders.</p> <p><u>Module Testing (Removed from Field)</u> Implement negotiated Cellnet Returned Material Analysis (RMA).</p> <p>Develop predictive failure information using Cellnet RMA data.</p> <p><u>Meter Testing (Removed from Field)</u> Review and adjust as necessary the Xcel RMA processes to ensure that gas meters are being adequately tested and reported.</p>	<p>December 2009 (Complete random and periodic testing) Completed</p> <p>March 2009 (enhanced ZCD process implemented) Completed</p> <p>June 2009 (Field order completion reporting implemented) Completed</p> <p>June 2009 (Cellnet RMA process implemented) Completed</p> <p>October 2009 (Xcel RMA processes reviewed) Completed</p> <p><i>Completed and ongoing.</i></p> <p><i>RMA Process enhancements fully implemented by March 31, 2010.</i></p>



## Revenue Cycle Process Review Action Plan

### Recommendation 3 – Ensure there is a sufficient pool of skilled revenue cycle process performers (Actions 18-24)

Action	Alternate or Related Action Description	Process Leader	Action Plan Steps	Timeline (by when)
18) Ensure that the meter reading resource staffing level is sufficient to read all manual routes under normal conditions – which is Xcel’s current policy – and also to account for potential de-automation – the reversion of selected AMR electric or natural gas meters for which reliable automated readings cannot be obtained back to manual reading		Meter Reading Human Resources	<p>Track consecutive estimates on a daily basis to ensure timely response to changes in this key metric that could indicate a short-term resource gap.</p> <p>Develop process to better link the release of meter reading resources to the Cellnet deployment schedule.</p> <p>Submit comprehensive HR plan to HR.</p> <p>CS leadership reconciles the workforce plan. (Note: This plan is based on the current Cellnet deployment schedule.)</p> <p>Create contingency plan for increasing staffing in the event of de-automation by February 28.</p>	<p>June 2009 Completed</p> <p>November 2009 Completed</p> <p>September 2009 Completed</p> <p>October 2009 Completed</p> <p>February 2010 Contingency plan still under development- on track Completed April 2010. Meter Reading staffing plan completed and synchronized to the resource plan. With the residential 2-may passing first article testing, no new contingency needs to be added to the resource</p>



## Revenue Cycle Process Review Action Plan

Action	Alternate or Related Action Description	Process Leader	Action Plan Steps	Timeline (by when)
19) Create more comprehensive structured training courses for advanced mass market billing analysts, C&I billing analysts, and rate information specialists and use these training courses to upgrade current skill levels and introduce additional resources into these groups as needed.	Establish more formal progression of advanced training for all billing analysts, but particularly C&I billing analysts, to shorten the time required to make a billing analyst fully productive.	Billing Training	Identified set of sustainment training topics Sustainment training developed and implemented. Progression Program core curriculum design and planning.	plan. June 2009 Completed October 2009 Completed and ongoing September 2010 Sustainment Training Complete and Ongoing. The Billing Progression program is in progress. Currently working through HR and Compensation needs along with volume of work, number of hours, with alignment to number of resources – implementation is expected in 2Q 2011.
20) Plan for staffing increases in C&I Billing area to prepare for retirements and to accommodate the non-C&I tariff work that has been added to this group's responsibilities.		Billing Human Resources	Submit comprehensive HR plan to HR. CS leadership reconciles the workforce plan.	September 2009 Completed Completed June 2010 Workforce plan reconciled in June 2010. Staffing will be maintained at the



## Revenue Cycle Process Review Action Plan

Action	Alternate or Related Action Description	Process Leader	Action Plan Steps	Timeline (by when)
21) Evaluate Business System staffing levels to ensure appropriate support levels are maintained for processes that are automated and for new technologies that are implemented to support the revenue cycle process.		Business Systems	<p>Review historic staffing levels to support rate changes and compare to expected rate case activity for coming 18 to 24 months.</p> <p>Review analysis with management and determine next steps re: staffing changes.</p> <p>Complete any approved staffing changes.</p>	<p>September 2009 Completed</p> <p>October 2009 Completed</p> <p>April 2010 Completed.</p> <p>One additional staff member added in mid-August to support Billing changes.</p>
22) Implement more cross functional training on the revenue cycle processes so that participants better understand how they fit into the process and how other groups also fit in.	<p>Create revenue process training courses that clarify each process performer's role in the overall process, handoffs between roles and groups, and best practices for using the CRS, IEH, Mobile Dispatch System, and other shared technologies.</p> <p>Develop and deliver formal revenue cycle process-wide familiarization training for most revenue cycle participants so the impacts of actions in one area on others are</p>	<p>Revenue Cycle Process Owners</p> <p>Training</p> <p>Human Resources</p>	<p>Conduct Training Needs Analysis.</p> <p>Develop a formal proposal to design and deliver entry level and sustainment training to close identified gaps.</p> <p>Training Development</p>	<p>November 2009 Completed</p> <p>December 2009 Completed</p> <p>March 2010</p> <p>April 2010</p>



## Revenue Cycle Process Review Action Plan

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	better understood by all process performers.		<p>Training Delivery</p> <p>Develop a module to educate employees (cross-functional) on the Revenue Cycle Process.</p> <p>Implementation begins</p>	<p>December 2010</p> <p>March 2010</p> <p>April 2010</p> <p>June 2010</p> <p><i>The development phase is complete.</i></p> <p><i>Revenue Cycle Process Overview was completed at end of June and validated by the M2M cross-functional working team members.</i></p> <p><i>Training will be added to employee learning plans and is anticipated to be released during 1Q 2011 as a Learning Management System course. Training materials were handed-off for conversation to LMS modules for widespread delivery.</i></p>
23) Improve time tracking for the time that employees dedicate to special projects as compared to core job activities to support better workload		Billing	<p>Coordinate team to identify “special projects” work.</p> <p>Develop and implement</p>	<p>December 2009 Completed</p> <p>January 2010</p>



## Revenue Cycle Process Review Action Plan

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trending:			enhancements to the tracking system.	Completed
24) Capture additional business process knowledge from experienced workers by documenting the processes at a performer level across the revenue cycle, and make this information available to all revenue cycle participants.		Revenue Cycle Process Owners Human Resources Training	Develop Knowledge Management & Transfer Strategy -A Knowledge Transfer tool is under development and will be available to all Xcel Energy business units via XpressNet. -This tool has now reached final design and will be accessible at the end of October. This sub-team will review the tool for appropriate modifications to support Revenue Cycle workgroup needs.  Identify Pilot Group	March 2010 Completed
			Pilot Knowledge Management Tool with specific work group	November 2009 Completed
			Review Pilot group results make adjustments	February 2010 Completed
			Identify Long Term Operational Plan	February 2010 Completed
			Launch Knowledge Management Tool to entire organization	March 2010 Completed
			Review documented processes and update training including CCQR programs to ensure knowledge is	March 2010 Completed



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			transferred.	<p><i>Completed.</i></p> <p><i>Used the knowledge transfer matrix to document additional process data from experienced back-office employees. This information was used to develop additional sustainment training. Additional process data captured during the revenue cycle process reviews was incorporated into existing training modules and/ or used to update CCQR.</i></p>



## Revenue Cycle Process Review Action Plan

### Additional Process Improvement Opportunities

Action	Alternate or Related Action Description	Process Leader	Action Plan Steps	Timeline (by when)
A1) Define key billing accuracy measures (including those selected as key controls from the set of metrics in Section 4.1) to trigger employee notifications when they are violated, require positive confirmation that they have been addressed, and be subject to escalation if they are not resolved in a timely manner. If it is not possible to achieve this type of business process management with the current CRS workflow technology, evaluate business process management (BPM) tools that can be integrated with the CRS and other Xcel systems to provide advanced business process notification, workflow, routing, status tracking, and escalation capabilities.		Revenue Cycle Process Owners	Evaluate current BPM tool capabilities.	September 2010 <i>Key measures implemented, and additional accuracy controls put in place. The Training Indicators database is the system of record which notifies and tracks user violations. No specific CRS BPM availability to-date.</i>
A2) [C]ontinue to review and refine customer letter templates for explaining billing errors and rebilling.		Business Systems	Determine appropriate action.	January 2011
A3) Conduct a requirements analysis for the Mobile Dispatch System to identify the set of additional configuration, functional enhancements, integration, and training necessary to support the field installation and maintenance processes, which are critical to improving metering performance.	Update Mobile Dispatch System capabilities for all field support groups, as the current implementation does not meet the needs of the meter support groups.	Billing	Conduct review of CRS letters with the communications team.  Facilitate Regulatory review of CRS letters  Review remaining, infrequently used letters in the repository.  Identify cross functional requirements and gaps - (Determine what can the system can do and what can't the system do)	October 2009 Completed  March 2010 <i>On-going, as necessary</i>  March 2010 <i>On-going, as necessary</i>  August 2009 Completed
		Meter Reading	Establish Advantex functional roadmap.	September 2009 Completed



## Revenue Cycle Process Review Action Plan

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A4) Incorporate customer contact center information into the Enterprise Data Warehouse and combine this with enhanced call coding to provide trending and anomaly detection on call type, geographic location, customer class, measuring device type, or device lot. As the Xcel service areas have increased in size and diversity, it has become more important for informal correlation of call trends to be supplemented by additional analytics.		Call Center Business Analytics Business Systems	Develop plan to close the gaps.  Determine level of effort Quantify potential benefits Determine cost/benefit and next steps Determine plan for accepted changes Complete changes	December 2010 Completed <i>Implemented plan in July 2010. New processes to support field meter inventory were added to the Advantex, closing the largest gap identified in the Advantex review.</i>  November 2009 Completed November 2009 Completed January 2010 Completed February 2010 Completed February 2010 <i>On-going. With the support of Business Analytics, developed an interim solution to track consumption patterns and correlate to known historical events. Identified and are</i>



## Revenue Cycle Process Review Action Plan

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A5) Review the business utilization of the PTJ as a workflow tracking tool and determine if changes in the way PTJs are used will better suit the work needs. If the PTJ approach cannot meet Xcel's business needs, evaluate commercial business process management (BPM) tools that could potentially provide the benefits of the PTJ work tracking approach to both the revenue cycle and other Xcel business processes while providing the routing, escalation, and tracking needed for more efficient work processes and improved customer service.		Revenue Cycle Process Owners  Business Systems	Determine level of effort  Quantify potential benefits  Determine cost/benefit and next steps  Determine plan for accepted changes  Complete changes	November 2010 <i>Activities will begin in 4Q2010</i> November 2010 <i>Activities will begin in 4Q2010</i>  January 2011  February 2011  September 2011
A6) [Continue] development of the Enterprise Data Warehouse initiative, with the objective of supporting [a] flexible, ad hoc reporting facility allowing various business units involved in the revenue cycle to create new views of customer, metering, billing, and remittance data as needed.		Business Analytics	Rollout of Self Service Suite and standardized reporting requests.  Schedule consistent meetings to discuss with business leadership their ongoing needs for data monitoring	September 2009 Completed  September 2009 Completed



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A7) Revise the BCL, new premise/account/rate setup process for increased automation and improved quality assurance.	Refer to Section 3.1.1.4	Builders Call Line	Develop Proposals to:  Update ServConn to provide a check box to select for heat affected.  Add logic to ServConn that derives the appropriate tariff based on pre-determined criteria.	December 2010  <i>Implementation expected to occur in December 2010.</i>
A8) Restrict meter exchanges only until the actual reading is recorded, not throughout the entire read window.	Refer to Section 3.1.2.2	Billing  Meter Reading  Metering	Analyze and determine next steps	December 2010  <i>Completed additional reporting to monitor and maintain workable levels in June 2010. System enhancement to restrict or bypass meter exchanges in the billing window scheduled for a 2011 implementation.</i>
A9) Review ways to reduce the impact of the reduced reading window on manual (handheld and van) meter readers.	Refer to Section 3.1.2.2	Meter Reading  Business Systems	Implement changes to the IT process that upload meter reads to allow a later upload time on day 2, effectively adding 1 day to the read window.  Align the Cellnet upload process and the current 3 day read window in CRS	January 2010 Completed   February 2010 Completed
A10) Improve field meter location selection and recording of locations.	Refer to Section 3.1.2.2	Metering	Review impact on processes	December 2010  <i>Efforts are underway to improve the recording of meter locations and to ensure the information</i>



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A11) Review the project management tools and training for the Regulatory Administration group, and possibly the roles in the group itself, to ensure that it can continue to effectively accommodate both the core regulatory responsibilities and the important project management role.	Refer to Section 3.1.3.2	Regulatory	Facilitate review of process	December 2010 <i>is entered into the data systems accurately.</i>