

North American Energy Standards Board

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NORTH AMERICAN ENERGY STANDARDS BOARD

~~2002-2003~~ 2004 DRAFT ANNUAL PLAN - RETAIL ELECTRIC QUADRANT¹

Item Number & Description	Completion ²	Assignment
Retail Access Uniform Business Practices (UBP)³		
1 Billing & Payments Develop practices for billing customers and remitting payments to parties providing services to the customer. Status: Underway, being coordinated with RGQ.	3rd Qtr 2003	Customer Processes Subcommittee
2 Creditworthiness Standards Develop practices for extending commercial credit by Distributors to Suppliers to cover financial risk. Status: Underway, being coordinated with RGQ.	3rd Qtr 2003	Supplier-Utility Interface Subcommittee
<u>3</u> <u>Customer Usage Information</u> <u>Develop practices for exchanging and retaining customer usage information. (For example: historical usage, pre-enrollment oriented and billing oriented usage.)</u>	<u>2nd Qtr.</u> <u>2004</u>	<u>Customer Processes Subcommittee</u>
<u>43</u> <u>Customer Enrollment & Switching & Dropping</u> <u>Develop practices for submitting and receiving, processing and fulfilling a customer's request to enroll with or leave a supplier (including suppliers dropping customers) and for maintaining current customer account information, and for notifying affected parties. Develop practices for market participants to process customer switch requests, for maintaining current customer account information regarding a customer's Supplier, and for notifying affected parties.</u>	<u>3rd Qtr.</u> <u>2004</u>	Customer Processes Subcommittee
<u>54</u> Supplier Licensing Develop practices for licensing Suppliers with state utility commissions.	<u>2004</u> ⁵	Supplier-Utility Interface Subcommittee

¹ As outlined in the NAESB Bylaws, the REQ will also address requests submitted by members and assigned to the REQ through the Triage Process.

² Dates in the completion column are by end of the quarter for completion by the assigned committee. The dates do not necessarily mean that the standards are fully staffed so as to be implementable by the industry, and/or ratified by membership. If one item is completed earlier than planned, another item can begin earlier and possibly complete earlier than planned. There are no begin dates on the plan.

³ A "Glossary" exists from the November 2000 UBP document that should be maintained and updated as a common glossary for all items under this sub-heading as the sub-committees address the UBP items in this section of the Plan.

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Retail Access Uniform Business Practices (UBP) (continued)

<u>65</u> Retail Meter Data Validation, Editing & Estimating	2004 <u>5</u>	Supplier-Utility Interface Subcommittee
Develop procedures for insuring the integrity and validity of retail customer metering data that is needed by utilities and suppliers for billing, load profiling, settlement, etc. Issues related to unbundled or competitive metering are not to be considered.		
<u>76</u> Customer Information	<u>4th Qtr.</u> 2004	Customer Processes Subcommittee
<p><u>Develop practices for the release, collection, exchange and maintenance of customer information between and among market participants, such as customer authorization, pre-enrollment information, customer lists, enrollment information and post-enrollment information.</u></p> <p><u>Develop procedures and protocols for communicating the nature & level of a customer's service as human needs, firm, interruptible, critical needs, and/or building protection for emergency services.</u>Develop practices for the release, collection, exchange & maintenance of customer information between Distributors and Suppliers.</p>		
<u>87</u> Load Profiling	2004 <u>5</u>	Supplier-Utility Interface Subcommittee
Develop practices for using statistical methods to estimate interval consumption by customers who do not have interval meters.		
<u>98</u> Customer Inquiries	2004 <u>5</u>	Customer Processes Subcommittee
Develop procedures for responding to customer inquiries directed to Distributors and/or Suppliers and for notification of the other party.		
<u>109</u> Market Participant Interactions	<u>1st Qtr.</u> 2004	Supplier-Utility Interface Subcommittee
<p><u>Develop model practices to support interactions between Distribution Companies and/or registration agents and Suppliers, such as supplier registration processes, governing documents, and roles and obligations of both Distribution Company and/or registration agent and Supplier (e.g. content and framework of governing documents or orders).</u>Develop supplier registration processes for Distributors and protocols for communications and interactions between Distributors and Suppliers.</p>		
<u>1140</u> Utility – Supplier Disputes <u>Distribution Company – Supplier Disputes</u>	<u>2nd Qtr.</u> 2004	Supplier-Utility Interface Subcommittee
Develop dispute resolution procedures applicable to differences between Distributors <u>Distribution Companies</u> and Suppliers.		
<u>1244</u> Settlement Process	2004 <u>5</u>	Supplier-Utility Interface Subcommittee
Reconcile energy schedules and energy delivered by suppliers within a given market. Note: will need to be coordinated with the WEQ.		

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Data Exchange Protocols⁴

<p>1312 Electronic Delivery Mechanisms Develop electronic delivery mechanism guidelines including but not limited to: transactional data interchange, web sites, and bulletin boards. Status: Underway, being coordinated with RGQ.</p> <p>Note: This item to be split into two separate items dealing with Electronic Transport and QEDM pending language submitted by the TEIS chairs.</p>	<p>ET 2nd Qtr. 2004 QEDM 4th Qtr. 2004</p>	<p>Technical Electronic Implementation⁵</p>
<p>1413 Technical Electronic Implementation Standards – Billing & Payments Status: Dependent on completion of Item 1.</p>	<p>2nd Qtr. 2004</p>	<p>Technical Electronic Implementation</p>
<p>1514 Technical Electronic Implementation Standards – Customer Enrollment and Switching Status: Dependent on completion of Item 3.</p>	<p>4th Qtr. 2004</p>	<p>Technical Electronic Implementation</p>
<p>1615 Technical Electronic Implementation Standards – Metering Status: Dependent on completion of Item 5.</p>	<p>2004⁵</p>	<p>Technical Electronic Implementation</p>
<p>1716 Technical Electronic Implementation Standards – Load Profiling Status: Dependent on completion of Item 7.</p>	<p>2004⁵</p>	<p>Technical Electronic Implementation</p>
<p>1817 Technical Electronic Implementation Standards – Customer Information Status: Dependent on completion of Item 6.</p>	<p>2004⁵</p>	<p>Technical Electronic Implementation</p>

Provisional Activities

Review security standards as may be deemed necessary; Public Key Infrastructure (PKI).

“Energy Day” Standard - including assessment of changes to existing NAESB standards.

Program of Standards Maintenance & Fully Staffed Standards Work⁶

<u>Business Practice Requests</u>	<u>Ongoing</u>	<u>Assigned by the EC on a request by request basis</u>
<u>Information Requirements and Technical Mapping of Business Practices</u>	<u>Ongoing</u>	<u>Assigned by the EC on a request by request basis</u>
<u>Ongoing Interpretations for Clarifying Language Ambiguities</u>	<u>Ongoing</u>	<u>Assigned by the EC on a request by request basis</u>
<u>Ongoing Maintenance of Code Values and Other Technical Matters</u>	<u>Ongoing</u>	<u>Assigned by the</u>

⁴ Data exchange standards for Uniform Business Practices should be completed by the end of the quarter following the quarter in which the Executive Committee adopts the model business practices for that area of focus.

⁵ The TEIS is assigned the completion of any technical work forwarded to them by the business development subcommittees ideally one quarter after receipt of forwarded work.

⁶ This work is considered routine maintenance and thus the items are not separately numbered.

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[EC on a
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