

North American Energy Standards Board

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NORTH AMERICAN ENERGY STANDARDS BOARD 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
3 Customer Usage Information Develop practices for exchanging and retaining customer usage information. (For example: historical usage, pre-enrollment oriented and billing oriented usage.)	2 nd Qtr. 2004	Customer Processes Subcommittee
4 Customer Enrollment, Switching & Dropping 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.	3 rd Qtr. 2004	Customer Processes Subcommittee
5 Supplier Licensing Develop practices for licensing Suppliers with state utility commissions.	2005	Supplier-Utility Interface Subcommittee
Retail Access Uniform Business Practices (UBP) (continued)		
6 Retail Meter Data Validation, Editing & Estimating 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.	2005	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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Item Number & Description	Completion ²	Assignment
7 Customer Information 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. 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.	4 th Qtr. 2004	Customer Processes Subcommittee
8 Load Profiling Develop practices for using statistical methods to estimate interval consumption by customers who do not have interval meters.	2005	Supplier-Utility Interface Subcommittee
9 Customer Inquiries Develop procedures for responding to customer inquiries directed to Distributors and/or Suppliers and for notification of the other party.	2005	Customer Processes Subcommittee
10 Market Participant Interactions 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).	1 st Qtr. 2004	Supplier-Utility Interface Subcommittee
11 Distribution Company - Supplier Disputes Develop dispute resolution procedures applicable to differences between Distribution Companies and Suppliers.	2 nd Qtr. 2004	Supplier-Utility Interface Subcommittee
12 Settlement Process Reconcile energy schedules and energy delivered by suppliers within a given market. Note: will need to be coordinated with the WEQ.	2005	Supplier-Utility Interface Subcommittee
Data Exchange Protocols⁴		
13 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. Note: This item to be split into two separate items dealing with Electronic Transport and QEDM pending language submitted by the TEIS chairs.	ET 2 nd Qtr. 2004 QEDM 4 th Qtr. 2004	Technical Electronic Implementation ⁵
14 Technical Electronic Implementation Standards - Billing & Payments Status: Dependent on completion of Item 1.	2 nd Qtr. 2004	Technical Electronic Implementation

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.

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15	Technical Electronic Implementation Standards – Customer Enrollment and Switching Status: Dependent on completion of Item 3.	4 th Qtr. 2004	Technical Electronic Implementation
16	Technical Electronic Implementation Standards – Metering Status: Dependent on completion of Item 5.	2005	Technical Electronic Implementation
17	Technical Electronic Implementation Standards – Load Profiling Status: Dependent on completion of Item 7.	2005	Technical Electronic Implementation
18	Technical Electronic Implementation Standards – Customer Information Status: Dependent on completion of Item 6.	2005	Technical Electronic Implementation
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			
	Business Practice Requests	Ongoing	Assigned by the EC on a request by request basis
	Information Requirements and Technical Mapping of Business Practices	Ongoing	Assigned by the EC on a request by request basis
	Ongoing Interpretations for Clarifying Language Ambiguities	Ongoing	Assigned by the EC on a request by request basis
	Ongoing Maintenance of Code Values and Other Technical Matters	Ongoing	Assigned by the EC on a request by request basis

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