

# North American Energy Standards Board

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## NORTH AMERICAN ENERGY STANDARDS BOARD 2002-2003 ANNUAL PLAN - RETAIL ELECTRIC QUADRANT<sup>1</sup>

| Item Number & Description                                                                                                                                                                                                                            | Completion <sup>2</sup> | Assignment                              |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|-----------------------------------------|
| <b>Retail Access Uniform Business Practices (UBP)<sup>3</sup></b>                                                                                                                                                                                    |                         |                                         |
| 1 Billing & Payments<br><i>Develop practices for billing customers and remitting payments to parties providing services to the customer.</i><br><b>Status: Underway completion date being coordinated with RGQ.</b>                                  | 3rd Qtr 2003            | Customer Processes Subcommittee         |
| 2 Creditworthiness Standards<br><i>Develop practices for extending commercial credit by Distributors to Suppliers to cover financial risk.</i><br><b>Status: Underway completion date being coordinated with RGQ.</b>                                | 3rd Qtr 2003            | Supplier-Utility Interface Subcommittee |
| 3 Customer Enrollment & Switching<br><i>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.</i> | 4th Qtr 2003            | Customer Processes Subcommittee         |
| 4 Supplier Licensing<br><i>Develop practices for licensing Suppliers with state utility commissions.</i>                                                                                                                                             | 4th Qtr 2003            | Supplier-Utility Interface Subcommittee |

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

<sup>2</sup> 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.

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

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## NORTH AMERICAN ENERGY STANDARDS BOARD 2002-2003 ANNUAL PLAN - RETAIL ELECTRIC QUADRANT<sup>4</sup>

| Item Number & Description                                                                                                                                                                                                                                                                                                        | Completion | Assignment                              |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|-----------------------------------------|
| <b>Retail Access Uniform Business Practices (UBP)<br/>(continued)</b>                                                                                                                                                                                                                                                            |            |                                         |
| 5 Retail Meter Data Validation, Editing & Estimating<br><i>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.</i> | 2004       | Supplier-Utility Interface Subcommittee |
| 6 Customer Information<br><i>Develop practices for the release, collection, exchange &amp; maintenance of customer information between Distributors and Suppliers.</i>                                                                                                                                                           | 2004       | Customer Processes Subcommittee         |
| 7 Load Profiling<br><i>Develop practices for using statistical methods to estimate interval consumption by customers who do not have interval meters.</i>                                                                                                                                                                        | 2004       | Supplier-Utility Interface Subcommittee |
| 8 Customer Inquiries<br><i>Develop procedures for responding to customer inquiries directed to Distributors and/or Suppliers and for notification of the other party.</i>                                                                                                                                                        | 2004       | Customer Processes Subcommittee         |
| 9 Market Participant Interactions<br><i>Develop supplier registration processes for Distributors and protocols for communications and interactions between Distributors and Suppliers.</i>                                                                                                                                       | 2004       | Supplier-Utility Interface Subcommittee |
| 10 Utility - Supplier Disputes<br><i>Develop dispute resolution procedures applicable to differences between Distributors and Suppliers.</i>                                                                                                                                                                                     | 2004       | Supplier-Utility Interface Subcommittee |

<sup>4</sup> As outlined in the NAESB Bylaws, the REQ will also address requests submitted by members and assigned to the REQ through the Triage Process.

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## NORTH AMERICAN ENERGY STANDARDS BOARD 2002-2003 ANNUAL PLAN - RETAIL ELECTRIC QUADRANT<sup>5</sup>

| Item Number & Description                                                                                                                                                                                                                                                 | Completion   | Assignment                              |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|-----------------------------------------|
| <b>Retail Access Uniform Business Practices (UBP) (continued)</b>                                                                                                                                                                                                         |              |                                         |
| 11 Settlement Process<br><i>Reconcile energy schedules and energy delivered by suppliers within a given market. Note: will need to be coordinated with the WEQ.</i>                                                                                                       | 2004         | Supplier-Utility Interface Subcommittee |
| <b>Data Exchange Protocols<sup>6</sup></b>                                                                                                                                                                                                                                |              |                                         |
| 12 Electronic Delivery Mechanisms<br><i>Develop electronic delivery mechanism guidelines including but not limited to: transactional data interchange, web sites, and bulletin boards.</i><br><b>Status: Underway completion date being coordinated with RGQ and WGQ.</b> | 3rd Qtr 2003 | Technical Electronic Implementation     |
| 13 Technical Electronic Implementation Standards - Billing & Payments<br><b>Status: Dependent on completion of Item 1.</b>                                                                                                                                                | 4th Qtr 2003 | Technical Electronic Implementation     |
| 14 Technical Electronic Implementation Standards - Customer Enrollment and Switching<br><b>Status: Dependent on completion of Item 3.</b>                                                                                                                                 | 2004         | Technical Electronic Implementation     |
| 15 Technical Electronic Implementation Standards - Metering<br><b>Status: Dependent on completion of Item 5.</b>                                                                                                                                                          | 2004         | Technical Electronic Implementation     |
| 16 Technical Electronic Implementation Standards - Load Profiling<br><b>Status: Dependent on completion of Item 7.</b>                                                                                                                                                    | 2004         | Technical Electronic Implementation     |
| 17 Technical Electronic Implementation Standards - Customer Information<br><b>Status: Dependent on completion of Item 6.</b>                                                                                                                                              | 2004         | Technical Electronic Implementation     |

<sup>5</sup> As outlined in the NAESB Bylaws, the REQ will also address requests submitted by members and assigned to the REQ through the Triage Process.

<sup>6</sup> 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.