

Retail Gas Quadrant Annual Plan Committee Work Paper
Proposed Topics for the
NORTH AMERICAN ENERGY STANDARDS BOARD
DRAFT 2002-2003 RETAIL GAS QUADRANT ANNUAL PLAN

Item Description	Completion	Assignment
Retail Access Uniform Business Practices (UBP)		
1 Customer Information <i>Develop practices for the release, collection, exchange & maintenance of customer information between Distributors and Suppliers. Such practices may involve the customer authorization process, and the necessary data elements and the process for providing pre-enrollment information, customer lists, enrollment information and post-enrollment information.</i>	4 th Qtr 2002	
2 Supplier Licensing <i>Develop practices for licensing Suppliers with state utility commissions and for registering suppliers with distributors. Such practices may involve the applications process and requirements.</i>	4 th Qtr 2002	
3 Market Participant Interactions <i>Develop model practices to support the interactions between Distributors and Suppliers. Such practices may involve the content and framework of the governing documents (ie. regulatory documents/orders, a Master Service Agreement between the parties, Operational Manuals, etc) that would establish the legal relationship, obligations and roles of both the Distributor and the Supplier. Such practices may also establish performance standards between the market participants.</i>	1 st Qtr 2003	
4 Customer Inquiries <i>Develop procedures for responding to customer inquiries directed to Distributors and/or Suppliers and for notification of the other party. Such practices may involve the management of inquiries involving switching and enrollment, billing, changes in customer account information, customer disputes and distribution emergencies.</i>	1 st Qtr 2003	
5 Customer Enrollment & Switching <i>Develop practices for submitting (and receiving), processing and fulfilling a customer's request to enroll with a Supplier. Such practices may establish the enrollment and customer authorization requirements between a Supplier and a Customer for written, telephone and internet enrollments (and other possible forms), establish the practices for Distributors to process, validate and communicate switch requests to/from Suppliers</i>	2 nd Qtr 2003	
6 Utility – Supplier Disputes <i>Develop dispute resolution procedures applicable to differences between Distributors and Suppliers. Such practices would be included</i>	2 nd Qtr 2003	

Item Description	Completion	Assignment
<i>in the governing documents.</i>		
7 Billing & Payments ¹ <i>Develop practices for billing customers and remitting payments to parties providing services to the customer. Such practices may involve the establishment of the necessary billing information that needs to be communicated between Distributors and Suppliers for different billing options (ie. dual bills or consolidated bills, and if consolidated bills - rate ready, bill ready), the timing for providing such information between the market participants, the information that should be included on customer's bills, and the payment procedures between the Distributor and the Supplier under different payment options (i.e. Assumption of receivables, pay-as-you-get-paid, etc)</i>	4 th Qtr 2003	
8 Creditworthiness Standards <i>Develop practices for extending commercial credit by Distributors to Suppliers to cover financial risk. Such practices may involve creditworthiness determination, maintenance of creditworthiness, determination of exposure, acceptable instruments of security, and calling on security.</i>	4 th Qtr 2003	
Data Exchange Protocols		
9 Technical Electronic Implementation Standards - Customer Information	1 st Qtr 2003	
10 Technical Electronic Implementation Standards - Customer Enrollment and Switching	3 rd Qtr 2003	
11 Technical Electronic Implementation Standards - Billing & Payments	1Qtr 2004	
12 Electronic Delivery Mechanisms	2 nd Qtr 2003	
Provisional Activities²		
Settlement Process <i>Develop standards for providing and processing data necessary to a reconcile a Supplier's hourly imbalance between energy delivered to Distributor's control area and the actual customer load (requires coordination with Electric Wholesale Quadrant)</i>		
Environmental Disclosure <i>Develop standards for disclosing generation mix and emissions data to customers</i>		
Distributed Generation <i>Develop standards for customers to connect small on-site generation and for handling net energy metering</i>		
Unbundled Competitive Retail Metering		

¹ Includes Retail Meter Data VEE [Validation, Editing & Estimating], Retail Meter Data Restatements and Supplier Delivery Point identification program)

² To the extent that it is determined that any of the provisional activities should be worked upon during the year, the Board has the discretion to modify the annual plan.