

North American Energy Standards Board

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Home Page: www.naesb.org

2003-2004 Draft RGQ Annual Plan

Action Item, Description and Priority Category	Completion Quarter	Subcommittee Assignment
1 Inventory Existing Natural Gas Practices within States ¹ Conduct inventory of existing natural gas practices in various states. Status: Underway.		Retail Gas Business Practice Inventory Task Force
2 Examine Wholesale Gas Quadrant EDM Standards Review NAESB Wholesale Gas Quadrant's (formerly known as GISB) "Electronic Delivery Mechanisms" manual to determine whether the standards within should be modified and/or adopted for use in the Retail Gas Quadrant. Status: Underway, being coordinated with REQ and WGQ.	2004	Technical Electronic Implementation
3 <u>Creditworthiness Standards</u> <u>Develop practices for extending commercial credit by Distributors to Suppliers to cover financial risk.</u> <u>Status: Underway, being coordinated with REQ. Creditworthiness</u> Develop practices for Distributors extending commercial credit to Suppliers to cover financial risk. Such development should be restricted to implementation of existing regulatory policy, new regulatory policy after it has been ordered and non-policy oriented aspects of Creditworthiness. Status: Underway, being coordinated with REQ.	3rd Qtr 2003	Supplier-Utility Interface
4 <u>Supplier Licensing</u> <u>Develop practices for licensing Suppliers with state utility commissions.</u> <u>Supplier Licensing</u> Develop practices for licensing Suppliers with state utility commissions and for registering Suppliers with Distributors (e.g. application process and requirements).	4th Qtr 2003 2005	Supplier-Utility Interface
5 <u>Customer Usage Information</u> <u>Develop practices for exchanging and retaining customer usage information. (For example: historical usage, pre-enrollment oriented, enrollment oriented and billing oriented usage.)</u>	2 nd Qtr. 2004	<u>Customer Processes Subcommittee</u>
65 Customer Enrollment, Switching & Dropping Develop practices for submitting and receiving, processing and fulfilling a customer's request to enroll with or leave a S supplier (including S suppliers dropping customers) and for maintaining current customer account information, and for notifying affected parties.	3 rd Qtr. 2004	Customer Processes
76 <u>Billing & Payments</u> <u>Develop practices for billing customers and remitting payments to parties providing services to the customer.</u> <u>Status: Underway, being coordinated with REQ. Billing & Payment</u> Develop practices for billing customers; remittance to parties providing services to customers under different billing options (e.g. dual or consolidated bills; rate ready or bill ready); and payment between Distributor and Supplier under different payment options (e.g. assumption of receivables, pay as you get paid). Status: Underway, being coordinated with REQ.	3rd Qtr 2003	Customer Processes

¹ This is an ongoing item designed to serve as a resource to other RGQ subcommittees.

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Action Item, Description and Priority Category	Completion Quarter	Subcommittee Assignment
<p><u>87</u> Customer Information</p> <p>Develop practices for the release, collection, exchange and maintenance of customer information between Distributors and Suppliers <u>and among market participants</u>, such as customer authorization, pre-enrollment information, customer lists, enrollment information and post-enrollment information.</p> <p>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.</p>	<p><u>4th Qtr.</u></p> <p>2004</p>	<p>Customer Processes</p>
<p><u>98</u> <u>Customer Inquiries</u></p> <p><u>Develop procedures for responding to customer inquiries directed to Distributors and/or Suppliers and for notification of the other party.</u> Customer Inquiries</p> <p>Develop procedures for responding to customer inquiries directed to Distributors and/or Suppliers and for notifying the other party, such as inquiries involving switching and enrollment/disenrollment, billing, customer account changes, customer disputes and distribution emergencies.</p>	<p>20045</p>	<p>Customer Processes</p>
<p><u>109</u> Examine Wholesale Gas Quadrant Non -EDM Standards</p> <p>Review NAESB Wholesale Gas Quadrant's other <u>Non -EDM</u> manuals to determine whether the standards within should be modified and/or adopted for use in the Retail Quadrants <u>Gas Quadrant (i.e. review "Nominations," "Flowing Gas," "Invoicing," "Capacity Release," and "Contracts" manuals.)</u>.</p>	<p><u>4th Qtr.</u></p> <p>2004</p>	<p>Supplier-Utility Interface</p>
<p><u>1140</u> Market Participant Interactions</p> <p>Develop model practices to support interactions between Distributors <u>Registration Companies</u> and/or <u>registration agents</u> and Suppliers, such as <u>supplier registration processes</u>, governing documents, that establish the legal relationship, and roles and obligations, <u>including performance standards</u>, of both Distributor <u>Registration Company and/or registration agent</u> and Supplier (e.g. content and framework of governing documents or orders); Master Service Agreement, operational manuals, and so on).</p>	<p><u>1st Qtr.</u></p> <p>2004</p>	<p>Supplier-Utility Interface</p>
<p><u>1244</u> <u>Retail Utility-Supplier Disputes</u> <u>Distribution Company - Supplier Disputes</u></p> <p>Develop dispute resolution procedures <u>applicable to</u> resolve differences between Distributors <u>Registration Companies</u> and Suppliers, which would be included in the governing documents.</p>	<p><u>2nd Qtr.</u></p> <p>2004</p>	<p>Supplier-Utility Interface</p>
<p><u>Data Exchange Protocols²</u></p>		
<p><u>13</u> <u>Electronic Delivery Mechanisms</u></p> <p><u>Develop electronic delivery mechanism guidelines including but not limited to: transactional data interchange, web sites, and bulletin boards.</u></p> <p><u>Status: Underway, being coordinated with RGQ.</u></p> <p><u>Note: This item to be split into two separate items dealing with Electronic Transport and QEDM pending language submitted by the TEIS chairs.</u></p>	<p><u>ET 2nd Qtr.</u></p> <p><u>2004</u></p> <p><u>QEDM 4th Qtr.</u></p> <p><u>2004</u></p>	<p><u>Technical Electronic Implementation</u></p> <p>³</p>
<p><u>14</u> <u>Technical Electronic Implementation Standards - Billing & Payments</u></p>	<p><u>2nd Qtr.</u></p>	<p><u>Technical Electronic</u></p>

² 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.

³ 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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<u>Status: Dependent on completion of Item 1.</u>	<u>2004</u>	<u>Implementation</u>
<u>15</u> <u>Technical Electronic Implementation Standards – Customer Enrollment and Switching</u>	<u>4th Qtr.</u>	<u>Technical</u>
<u>Status: Dependent on completion of Item 3.</u>	<u>2004</u>	<u>Electronic Implementation</u>
<u>16</u> <u>Technical Electronic Implementation Standards – Metering</u>	<u>2005</u>	<u>Technical</u>
<u>Status: Dependent on completion of Item 5.</u>		<u>Electronic Implementation</u>

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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 Work⁴		
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

⁴ This work is considered routine maintenance and thus the items are not separately numbered.