

North American Energy Standards Board

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TO: Interested Industry Participants
FROM: REQ CPS Co-Chair, Rick Alston and RGQ CPS Co-Chair, Barbara Fatina
RE: Draft Agenda for the REQ and RGQ Joint Customer Processes Subcommittee
Conference Call – March 17, 2004
DATE: March 12, 2004

**NORTH AMERICAN ENERGY STANDARDS BOARD
RETAIL ELECTRIC QUADRANT AND RETAIL GAS QUADRANT
JOINT CUSTOMER PROCESSES SUBCOMMITTEE MEETING**

Teleconferencing arrangements-call NAESB

Wednesday March 17, 2004 11:00 a.m. to 1:00 p.m. CT (NOON to 2 p.m. ET)

DRAFT AGENDA

1. **Administrative**
 - Welcome
 - Antitrust
 - Attendee Roll Call
 - Adoption of Draft Agenda
 - Adoption of Meeting Minutes from Conference Call February 13, 2004
2. **Brief comments on the Web Casting process-Les Nishita**
3. **Discussion of the Billing and Payment Processing documents needed for the TEIS:**
 - **Data Dictionaries for 1. Invoice 2. Payment 3. SRBO**
 - **Sample Paper Transactions for CB-BR, CB-RR, SRBO, Payment**
 - **Technical Implementation of Business Process for Billing and Payment**

1) Since the conclusion of our March meeting, I have made a number of changes to our invoice related SPT documents that were approved at the meeting, but were not reflected in the documents I sent to you (and to be posted with the meeting minutes). This was the result of our working on the Invoice Data Dictionary and our discovery at that time that we wanted to go back and revise the SPT for Bill Ready (11 changes) and Rate Ready (13 changes) but did not do so before the meeting came to a close.

I will post the two corrected invoice Sample Paper Transaction documents for the conference call and send you a copy via email as soon as I proof my work. ***Both SPTs have three sets or "passes" that clearly mark the progression of the document. We should work from pass #3 as it represents the approved (clean) version of the work we did at the March meeting.***

2) Additionally, I discovered that the Data Dictionary we drafted at the meeting was missing the data elements New England uses for off-peak and on-peak usage (we added them at our January meeting and kept them intact through the February conference call), so I will issue a "straw man" Data Dictionary that reflects our draft document with added data elements for New England and a few more that are on the appropriate SPT but not make the Data Dictionary before the meeting came to a close. It is my understanding that every element we approve to place on the SPT must appear in the Data Dictionary.

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I will post the "straw man" Data Dictionary for the conference call and send you a copy via email as soon as I proof my work. ***The "straw man" Data Dictionary will have four (4) worksheets including the Introduction that you should read before proceeding to the other worksheets. Our goal is to complete the definitions, usages, conditions, comments and code values.***

3) We did not get final approval on the SPT for SRBO at our March meeting, so that will be reviewed on our conference call. I hope Derek or Blake will help us with this. ***Blake has provided comments for us to review. Once we complete the review, we can create the associated Data Dictionary.***

4) We also need to do the Payment SPT and Data Dictionary. I will try to create a "straw man" document for both, so be prepared to discuss them.

The TIBP will be re-drafted after we get through this conference call.

4. **Next Steps**

TIBP

May 5-7 Meeting

5. **Adjourn**