



North American Energy Standards Board

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NORTH AMERICAN ENERGY STANDARDS BOARD

2009 WEQ Annual Plan Proposed changes from the Subcommittee and Working Group Co-Chairs and From WEQ EC Leadership

REVISED DECEMBER 22, 2008

| Item Description | Completion ¹ | Prior Target Date |
|---|-------------------------|----------------------------|
| 1 Develop business practices standards as needed to complement reliability standards | | |
| Develop business practice standards to support and complement NERC reliability standards, NERC policies and NERC standards authorization requests (SARs) using the NERC/NAESB Coordination Joint Standards Development Process as appropriate. Current NAESB activities underway to develop business practice standards that are supportive of this annual plan item are: | | |
| a) Make changes to business practices as related to inclusion of the NERC Reliability Functional Model functional model entities as NERC undertakes the same efforts. Status: No requests | As requested | As requested since 12/9/04 |
| b) Develop business practices to support Coordinate Interchange – R05020 “Include a guideline for rounding schedules with partial mWh’s in the coordinate interchange business practice WEQ BPS-002-000” Status: Underway | 3 rd Q 2009 | 3 rd Q, 2006 |
| c) Continuous support of TLR Procedure in alignment with NERC efforts on TLR Phase II and Phase III development. | | |
| i) Parallel Flow Visualization/Mitigation for Reliability Coordinators in the Eastern Interconnection. Note: Activity is dependent on NERC approval of SAR. Status: Not Started | 4 th Q, 2009 | New 2008 |
| ii) Update WEQ-008 Appendix D to include the Market Flow Threshold Percentage recommended by NERC working group/task force Status: Not Started | 3 rd Q, 2009 | New 2008 |
| d) Conduct analysis as to whether standards can be developed which outline a standardized process for the coordination and execution of emergency energy schedules. These would be complementary standards to EOP-002-2 Requirements R4 and R6 (SRS Analysis of EOP-002-2 R4 & R6) Status: Not Started | 1 st Q 2009 | New 2008 |
| e) Time Error and Inadvertent (BAL-004 and BAL-006) Coordination with NERC Status: Not Started | 2009 | New 2008 |
| f) DCS and AGC (BAL-002 and BAL-005) Coordination with NERC Status Not Started | 2009 | New 2008 |
| g) Develop complementary standards that align with NERC Project 2008-01 Voltage and Reactive Control Status: Not Started | 2009 | New 2008 |



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| 2 Develop business practice standards in support of the FERC RM05-25-000 and RM05-17-000 (OATT Reform) | | |
| a) Develop version 2 business practice standards to better coordinate the use of the transmission system among neighboring transmission providers. Such business practice standards would be based on recommendations from NERC's Long Term ATC/AFC Task Force and would involve revised procedures for the ATC calculation and/or revised protocols as determined by the final order. Status: Underway Development is using joint standards development process with NERC. Request R050004 was expanded to include the Order No. 890 (Docket Nos. RM05-25-000 and RM05-17-000) and Order No. 890-A (Docket Nos. RM05-17-001, 002 and RM05-25-001, 002), "Preventing Undue Discrimination and Preference in Transmission Services", issued April 11, 2007). | | |
| i) Group 3: Network Service On OASIS | | |
| 1. Use of OASIS to Make Electronic Requests to Designate and Terminate Network Resource Status: Underway | 1 st Q, 2009 | 2 nd Q 2008 |
| 2. Ability to Query Requests to Designate and Terminate Network Resources and Allow for Queries of All Information Provided with Designation Requests Status: Underway | 1 st Q, 2009 | 2 nd Q 2008 |
| 3. Masking of Designated Network Resource Operating Restrictions and Generating Cost Information Status: Underway | 1 st Q, 2009 | 2 nd Q 2008 |
| 4. Procedural Requirements for Submitting Designations over new OASIS Functionality Status: Underway | 1 st Q, 2009 | 2 nd Q 2008 |
| 5. Specify How Designated Network Service Informational Postings are Posted on OASIS Status: Underway | 1 st Q, 2009 | 2 nd Q 2008 |
| 6. Set Forth the Treatment of OASIS Requests when the Customer Fails to Provide the Necessary Attestation Status: Underway | 1 st Q, 2009 | 2 nd Q 2008 |
| 7. Procedural Requirements for Submitting Both Temporary and Indefinite Terminations of Network Resources Status: Underway | 1 st Q, 2009 | 2 nd Q 2008 |



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| | 8. Procedures for Submitting and Processing Requests for Concomitant Evaluations of Transmission Requests and Temporary Terminations Status: Underway | 1 st Q, 2009 | 2 nd Q 2008 |
| iv) | Group 4: Pre-Emption; Request No. R05019; and Revisions to Standard 9.7 | | |
| | 1. Pre-Emption Status: Not Started | 2 nd Q, 2009 | 2 nd Q 2008 |
| | 2. Request No. R05019 Status: Not Started | 2 nd Q, 2009 | 2 nd Q 2008 |
| | 3. Revisions to Standard 9.7 Status: Underway | 2009 | 2 nd Q 2008 |
| v) | Group 5: Paragraph 1377 | | |
| | 1. Paragraph 1377 Status: Not Started | 2 nd Q, 2009 | 3 rd Q 2008 |
| | 2. Re-Bid Of Partial Service across Multiple Transmission Providers' Systems Status: Not Started | 2 nd Q, 2009 | 3 rd Q 2008 |
| vi) | Group 6: Miscellaneous (Paragraphs 1390 and 1627 of Order 890) | | |
| | 1. Paragraph 1390 of Order 890 Status: Not Started | 2 nd Q, 2009 | 3 rd Q 2008 |
| | 2. Paragraphs 1627 of Order 890 Status: Not Started | 2 nd Q, 2009 | 3 rd Q 2008 |
| | 3. Redispatch Cost Posting to allow for posting of third party offers of planning redispatch services. Status: Not Started | 2 nd Q, 2009 | 3 rd Q 2008 |
| b) | Develop the needed business practices as companion to the NERC standards for ATC related efforts | | |
| i) | Develop standards to support existing Request No. R05004 . | | |



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| <p>1. The processing of transmission service requests, which use TTC/ATC/AFC, in coordination with NERC changes to MOD 001 where the allocation of flowgate capability based on historical Network Native Load impacts the evaluation of transmission service requests, requiring the posting of those allocation values in conjunction with queries of service offerings on OASIS</p> <p>Status: Underway</p> | 1 st Q, 2009 | Pending as of 12/3/2005 Later set 4 th Q 2008 |
| <p>3 Develop business practices standards to improve the current operation of the wholesale electric market and develop and maintain business practice and communication standards for OASIS and Electronic Scheduling</p> | | |
| <p>a) Develop and/or maintain business practice standards as needed for OASIS and electronic scheduling. Specific items to address include:</p> | | |
| <p>i) Network Services: Determine and develop needed business practice standards or other support is needed to support use of OASIS for Network Service transactions (R04006E). (Related to AP 2(a)(iii))</p> <p>Status: Underway</p> | 1 st Q, 2009 | 3 rd Q 2006 |
| <p>ii) Registry (TSIN): Determine and develop needed business practice standards to support the registry functions currently supported by NERC (R04037, R06027). R04037 was previously targeted for R04037.</p> | | |
| <p>1) Work with the NAESB counsel to develop a confidentiality agreement, (R07013)</p> <p>Status: Underway</p> | 2009 | 4 th Q 2008 |
| <p>2) Transition the TSIN Registry from NERC to NAESB.</p> <p>Status: Underway</p> | 2009 | 4 th Q 2008 |
| <p>3) Review and correct the Coordinate interchange Business Practice Standard as noted during the development of the e-Tag 1.8 development process.</p> <p>Status: Underway</p> | 3 rd Q, 2009 | 4 th Q 2008 |
| <p>iii) Document procedures used to implement the displacement/interruption terms of the Pro Forma tariff (R05019).</p> <p>Status: Not Started</p> | 3 rd Q, 2009 | 3 rd Q 2006 |
| <p>iv) Make incremental enhancements to OASIS as an outgrowth of the NAESB March 29, 2005 conference on the future of OASIS (R05026). Scoping statement completed by SRS and assignments made to BPS, ESS/ITS and JISWG.</p> | | Identified as TBD on 12/13/2005 Later 2008 as defined |



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| 1) | Eliminate Masking of TSR tag source and sink when requested status is denied, withdrawn refused, displaced, invalid, declined, annulled or retracted Status: Not Started | 3 rd Q, 2009 | Identified as TBD on 12/13/2005 Later 2008 as defined |
| 2) | Initiate standard that eliminates the disparity of posting "sensitive" information. This standard should also include procedures of user certification that allows access to this class of information. Status: Underway | 2009 | Identified as TBD on 12/13/2005 Later 2008 as defined |
| 5) | Enhance the TSR result postings to allow showing of (i) limiting transmission elements and (ii) available generation dispatch options that would allow acceptance of reservation request. Status: Not Started | 2009 | Identified as TBD on 12/13/2005 Later 2008 as defined |
| v) | Respond to issues in FERC Order No. 676 (Docket No. RM05-5-000) – NAESB WEQ Standards 001 9.7, (paragraph 51 of the order). Status: Underway Item was assigned to group 4, reference 2007 WEQ AP item 2(a)(iv)(3). | 2009 | Delayed on 12/14/2006 later scheduled for 2 nd Q 2008 |
| vi) | Implement e-Tag version 1.8.1 Status: Not Started | 3 rd Q 2009 | New 2008 |
| vii) | Transition e-Tag Specification and schema to NAESB WEQ-004 (Coordinate Interchange) Status: Underway | 4 th Q 2009 | New 2008 |
| b) | Develop and/or maintain standard communication protocols and cyber-security business practices as needed. | | |
| i) | Develop PKI certification program for e-Tag and OASIS Status: Not Started | 4 th Q 2009 | |
| ii) | Develop PKI standards for OASIS. Status: Not Started | 2009 | 2 nd 2007 |
| iii) | Develop PKI Standards for e-tagging (Develop Implementation Plan). Status: Underway eTagging items are linked to the transition of the Registry from NERC to NAESB. | 2 nd Q 2009 | 2 nd 2007 |



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| iv) Develop enhanced Electric Industry Registry (EIR), (R06027) Status: Underway | 2009 | 4 th Q 2007 |
| c) Develop needed business practice standards for organization/company codes for NAESB standards – and address current issues on the use of DUNs numbers. Status: Underway Common code usage is linked to the transition of the Registry from NERC to NAESB. | 2009 | Originally on 2005 AP no date set Set 4 th Q 2006 Completion date later |
| d) Develop business practice standards in support of FERC Order 717 Status: Not Started | 2 nd Q, 2009 | New 2008 |
| 4 Review and develop business practices standards to Demand Response, Demand Side Management and Energy Efficiency Programs | | |
| Review and develop needed model business practices for a standardized method for quantifying benefits, savings, cost avoidance and/or the reduction in energy demand and usage derived from the implementation of demand side management and energy efficiency programs. This effort will include demand side response, energy efficiency programs and metering, including the 'curtailment service provider' program. | | |
| a) Develop matrix and business practice standards for measurement and verification for demand response programs in non-ISO/RTO footprint areas. Status: Underway | 2009 | 3 rd Q 2008 |
| b) Develop preamble for business practice standards for measurement and verification for demand response and energy efficiency programs. Status: Underway | 2009 | 4 th Q 2008 |
| c) Develop glossary for business practice standards Status: Underway | 2009 | 4 th Q 2008 |
| d) Support retail development of matrix and model business practice standards for measurement and verification for demand response programs Status: Underway | 2009 | 4 th Q 2008 |
| e) Develop business practice standards to measure and verify energy reductions that are made to comply with a Renewable Portfolio Standard that included energy efficiency or a stand-alone Energy Efficiency Portfolio Standard. Status: Not Started | Phase 2 | Listed on Initial 2008 AP |



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| <p>f) Develop business practice standards to factor Demand Control and Energy Efficiency programs into reliability / supply decisions at the wholesale level for generation and transmission planning and operations.</p> <p>Status: Not Started</p> | Phase 2 | Listed on Initial 2008 AP |
| <p>g) Develop business practice standards for cap and trade programs for green house gas</p> <p>Status: Not Started</p> | Phase 2 | Listed on Initial 2008 AP |
| <p>6 Maintain existing body of Version 2 standards</p> | | |
| <p>a) Make consistency changes to Version 1.0 standards as directed by the WEQ Leadership Committee on December 12, 2007 (R08001 – BPS, ESS/ITS, R08002 - ESS/ITS, R08003 - ESS/ITS - BPS, R08004, R08005 - ESS/ITS)</p> | | |
| <p>1) OASIS Consistency Changes (R08001, R08002, R08003, R08005)</p> <p>Status: Not Started</p> | 2009 | New 2008 |
| <p>2) Gas / Electric Communication Consistency Changes (R08004)</p> <p>Status: Underway</p> | 1 st Q 2009 | New 2008 |
| <p>b) Modify NAESB definitions to address internal inconsistencies and inconsistencies with the NERC glossary. Create a common NAESB glossary/definition of terms to be applicable to entire set of WEQ Business Practices. http://www.naesb.org/pdf3/weq_ec051308w3.doc</p> <p>Status: Underway</p> <p>Subcommittee co-chairs are developing WEQ-000 Definition of Terms/Acronyms to replace definitions being included in each NAESB Business Practice.</p> | 1 st Q, 2009 | New 2008 |
| <p>c) Develop standards to allow for registered Market Operators to request changes to the Market Level profile of Implemented Interchange (R06006)</p> <p>Status: Underway</p> <p>This request may be more of a clean-up in nature as it was requested in May 2006 but has not been addressed or presented as completed with the requisite documentation.</p> | 1 st Q, 2009 | Assigned to the ESS/ITS on 5/18/2006 |
| <p>d) Consistent with ¶51 of FERC Order No. 890-A, add AFC and TFC values to the “System_Attribute” data element of the NAESB Standard WEQ-003: OASIS S&CP Data Dictionaries. (R08011)</p> <p>Status: Not Started</p> <p>This Standards Request was assigned to the ESS/ITS in May 2008.</p> | 2009 | New 2008 |



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| e) | Provide for Enhanced Granularity for Public Utilities in Identifying Critical Operational Flow Orders. (R08020) Status: Not Started. This Standards Request was assigned to the BPS in August 2008. | 2009 | New 2008 |
| f) | Synchronize Bidding Credit Requirements for FTR, TCC and CRR (R08025) Posting of collateral is an important issue for financial marketers. Most financial marketers and smaller entities are required to post cash for FTR transactions, while most utilities post unsecured credit. Therefore, the timing for posting collateral is especially crucial to financial marketers. There are two posting periods for FTRs: 1. The Bidding Requirement: Credit must be posted with FTR bids and these monies are held until bids are cleared. 2. The Holding Requirement: After bids are cleared and FTRs awarded, collateral is required for the amount of time the FTR is active. Status: Not Started | 2009 | New 2008 |

End Notes WEQ 2009 Annual Plan:

¹ 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 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.