

North American Energy Standards Board

1301 Fannin, Suite 2350, Houston, Texas 77002
Phone: (713) 356-0060, Fax: (713) 356-0067, E-mail: naesb@aol.com
Home Page: www.naesb.org

NORTH AMERICAN ENERGY STANDARDS BOARD 2002–2003 ANNUAL PLAN – RETAIL ELECTRIC QUADRANT¹

Item Number & Description	Completion ²	Assignment
Retail Access Uniform Business Practices (UBP)³		
1 Billing & Payments <i>Develop practices for billing customers and remitting payments to parties providing services to the customer.</i> Status: Complete.	3rd Qtr 2003	Customer Processes Subcommittee
2 Creditworthiness Standards <i>Develop practices for extending commercial credit by Distributors to Suppliers to cover financial risk.</i> Status: Underway, being coordinated with RGQ..	3rd Qtr 2003	Supplier-Utility Interface Subcommittee
3 Customer Enrollment & Switching <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>	2004	Customer Processes Subcommittee
4 Supplier Licensing <i>Develop practices for licensing Suppliers with state utility commissions.</i>	2004	Supplier-Utility Interface Subcommittee

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

² 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.

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

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Item Number & Description	Completion	Assignment
Retail Access Uniform Business Practices (UBP) (continued)		
5 Retail Meter Data Validation, Editing & Estimating <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 <i>Develop practices for the release, collection, exchange & maintenance of customer information between Distributors and Suppliers.</i>	2004	Customer Processes Subcommittee
7 Load Profiling <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 <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 <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 <i>Develop dispute resolution procedures applicable to differences between Distributors and Suppliers.</i>	2004	Supplier-Utility Interface Subcommittee

⁴ 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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Item Number & Description	Completion	Assignment
Retail Access Uniform Business Practices (UBP) (continued)		
11 Settlement Process <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
Data Exchange Protocols⁶		
12 Electronic Delivery Mechanisms <i>Develop electronic delivery mechanism guidelines including but not limited to: transactional data interchange, web sites, and bulletin boards.</i> Status: Underway, being coordinated with RGQ.	2004	Technical Electronic Implementation
13 Technical Electronic Implementation Standards – Billing & Payments Status: Dependent on completion of Item 1.	2004	Technical Electronic Implementation
14 Technical Electronic Implementation Standards – Customer Enrollment and Switching Status: Dependent on completion of Item 3.	2004	Technical Electronic Implementation
15 Technical Electronic Implementation Standards – Metering Status: Dependent on completion of Item 5.	2004	Technical Electronic Implementation
16 Technical Electronic Implementation Standards – Load Profiling Status: Dependent on completion of Item 7.	2004	Technical Electronic Implementation
17 Technical Electronic Implementation Standards – Customer Information Status: Dependent on completion of Item 6.	2004	Technical Electronic Implementation

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

⁶ 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.