

North American Energy Standards Board

1100 Louisiana, Suite 3625, 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>	1 st Qtr 2003	Customer Processes Subcommittee	<div style="border: 1px solid black; padding: 2px; display: inline-block;">Deleted: 4th Qtr 2002</div> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Formatted</div>
2 Customer Enrollment & Switching <i>Develop practices for Distributors to process customer switch requests from Suppliers, for maintaining current customer account information regarding a customer's Supplier, and for notifying affected parties.</i>	2 nd Qtr 2003	Customer Subcommittee	<div style="border: 1px solid black; padding: 2px; display: inline-block;">Deleted: 1st</div>
3 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>	2 nd Qtr 2003	Supplier-Utility Interface Subcommittee	<div style="border: 1px solid black; padding: 2px; display: inline-block;">Deleted: 1st</div> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Formatted</div>
4 Customer Inquiries <i>Develop procedures for responding to customer inquiries directed to Distributors and/or Suppliers and for notification of the other party.</i>	3 rd Qtr 2003	Customer Processes Subcommittee	<div style="border: 1px solid black; padding: 2px; display: inline-block;">Deleted: 2nd</div> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Formatted</div>

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 UBPs document that should be maintained and updated as a common glossary for all items under this sub-heading as the sub-committees address the UBPs items in this section of the Plan.

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Item Number & Description	Completion ²	Assignment	
5 Creditworthiness Standards <i>Develop practices for extending commercial credit by Distributors to Suppliers to cover financial risk.</i>	▲ 1 st Qtr 2003	Supplier-Utility Interface Subcommittee	Formatted Deleted: 2 nd
6 Customer Information <i>Develop practices for the release, collection, exchange & maintenance of customer information between Distributors and Suppliers.</i>	▼ 4 th Qtr 2003	Customer Processes Subcommittee	Deleted: 3 rd
7 Supplier Licensing <i>Develop practices for licensing Suppliers with state utility commissions.</i>	▼ 2 nd Qtr 2003	Supplier-Utility Interface Subcommittee	Deleted: 3 rd Formatted Deleted: and for registering suppliers with distributors.
8 Load Profiling <i>Develop practices for using statistical methods to estimate interval consumption by customers who do not have interval meters.</i>	3 rd Qtr 2003	Supplier-Utility Interface Subcommittee	
9 Market Participant Interactions <i>Develop supplier registration processes for Distributors and protocols for communications and interactions between Distributors and Suppliers.</i>	4 th Qtr 2003	Supplier-Utility Interface Subcommittee	Deleted: except for issues that are addressed in items 6 and 9 below
10 Utility - Supplier Disputes <i>Develop dispute resolution procedures applicable to differences between Distributors and Suppliers.</i>	4 th Qtr 2003	Supplier-Utility Interface Subcommittee	
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>	▼ 1 st Qtr 2004	Supplier-Utility Interface Subcommittee	Deleted: 4 th Qtr 2003 Formatted

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Data Exchange Protocols

12	Electronic Delivery Mechanisms	4 th Qtr 2002	Technical Electronic Implementation	Deleted: 11
13	Technical Electronic Implementation Standards - Billing & Payments	2 nd Qtr 2003	Technical Electronic Implementation	Deleted: 1 st Qtr 2003 Inserted: 1 st Qtr 2003
14	Technical Electronic Implementation Standards - Metering	4 th Qtr 2003	Technical Electronic Implementation	Formatted Deleted: 12
15	Technical Electronic Implementation Standards - Customer Enrollment and Switching	3 rd Qtr 2003	Technical Electronic Implementation	Formatted Deleted: 1 st Deleted: 13
16	Technical Electronic Implementation Standards - Customer Information	1 st Qtr 2004	Technical Electronic Implementation	Formatted Deleted: 3 rd Inserted: 3 rd
17	Technical Electronic Implementation Standards - Load Profiling	1 st Qtr 2004	Technical Electronic Implementation	Formatted Deleted: 2 nd Deleted: 14 Deleted: 2 nd Formatted Deleted: 15 Deleted: 4 th Formatted Deleted: 3 Deleted: 16 Deleted: 4 th Formatted Deleted: 3

⁴ 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.