

North American Energy Standards Board

1301 Fannin, Suite 2350, Houston, Texas 77002

Phone: (713) 356-0060, Fax: (713) 356-0067, E-mail: naesb@naesb.org

Home Page: www.naesb.org

NORTH AMERICAN ENERGY STANDARDS BOARD 2005 ANNUAL PLAN – RETAIL ELECTRIC QUADRANT¹

REQ EC Revisions (8-24-05) Approved by the NAESB Board Managing Committee (9-22-05)

	Item Number & Description	Completion ²	Assignment ³
1	Billing & Payment Data Dictionaries and Models		
	a. Develop the Data Sets for the Billing & Payments MBPs Status: Underway	3 rd Qtr 2005	IR
	b. Modify Billing & Payments MBPs pursuant to Request R04034. Status: Completed.	3 rd Qtr 2005	BPS
	c. Technical Electronic Implementation Standards – Billing & Payments Status: Pending, Discussion Underway	3 rd Qtr 2005	TEIS
2	Market Participant Interactions Develop model practices to support interactions between Distribution Companies and/or registration agents and Suppliers, such as supplier registration processes, governing documents, and roles and obligations of both Distribution Company and/or registration agent and Supplier (e.g. content and framework of governing documents or orders). Status: Completed	1 st Qtr. 2005	SUIS/BPS
3	Pre-Enrollment Customer Information Develop practices for exchanging customer information necessary for interactions prior to enrollment and billing, i.e., customer authorization procedures, identifying types of customer information necessary for pre-enrollment activities, and methodologies for exchanging information. Status: Underway.	4 th Qtr. 2005	BPS
4	Customer Enrollment, Switching & Dropping Develop practices for submitting and receiving, processing and fulfilling a customer's request to enroll with or leave a supplier (including suppliers dropping customers) and for maintaining current customer account information, and for notifying affected parties.	2006	BPS

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 Assignments are subject to approval of the proposal to restructure the subcommittees.

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5	Examine Wholesale Gas Quadrant Non-EDM Standards Review NAESB Wholesale Gas Quadrant Non-EDM manuals to determine whether the standards within should be modified and/or adopted for use in the Retail Quadrants.	Ongoing	BPS
Technical Electronic Implementation Subcommittee⁴			
6	Quadrant EDM Establish the Quadrant specific EDM (QEDM) standards for REQ and RGQ. Status: Complete.	2 nd Qtr. 2005	Technical Electronic Implementation
7	Develop a model RGQ/REQ contract/outline modeled after the NAESB Base Contract for Sale and Purchase of Natural Gas, NAESB Standard 6.3.1 (NAESB Base Contract for Gas) designated for use by electric power markets or competitive gas markets. (R05013) Status:	2006	Contracts Subcommittee
8	Develop model business practices for electronic retail billing transactions and bill payment transactions between customers, suppliers, and utilities pursuant to Request No. R05016. Status:	2006	BPS
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.			
Electronic Customer Billing - Develop practices for the provision electronically of billing information.			
Future Activities			
Customer Inquiries Develop procedures for responding to customer inquiries directed to Distributors and/or Suppliers and for notification of the other party.		TBD	
Supplier Certification Develop practices for Distribution Companies to register/certify new Suppliers when they seek to begin doing business in the Distribution Company's service area.		TBD	
Retail Meter Data Validation, Editing & Estimating 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.		TBD	
Load Profiling Develop practices for using statistical methods to estimate interval consumption by		TBD	

⁴ 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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customers who do not have interval meters.		
Settlement Process Reconcile energy schedules and energy delivered by suppliers within a given market. Note: will need to be coordinated with the WEQ.	TBD	
Program of Standards Maintenance & Fully Staffed Standards Work⁵		
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
Ongoing Development and Maintenance of Definitions	Ongoing	Glossary Subcommittee

⁵ This work is considered routine maintenance and thus the items are not separately numbered.

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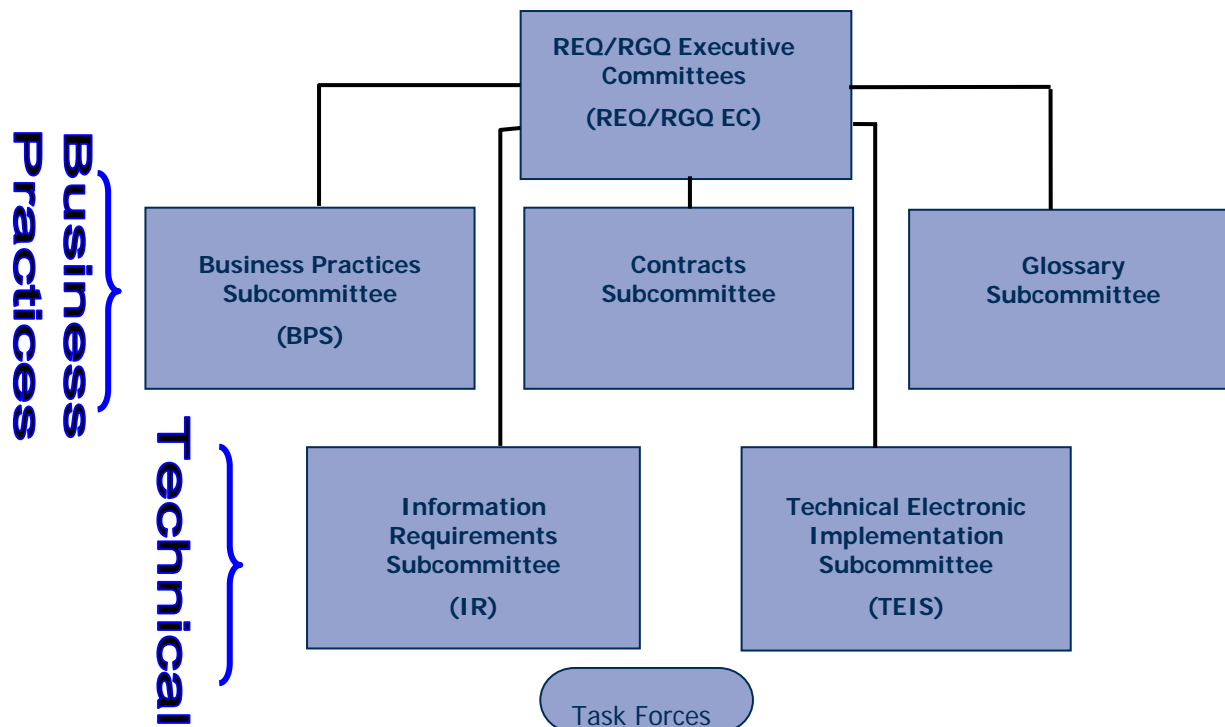
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NAESB Joint Retail Electric Quadrant and Retail Gas Quadrant

Committee Structure



NAESB RGQ EC and Subcommittee Leadership:

Executive Committee: Mike Novak, Chair and Suzanne Calcagno, Vice-Chair

Business Practices Subcommittee: Phil Precht

Information Requirements Subcommittee: George Behr

Technical Electronic Implementation Subcommittee: George Behr

Contracts Subcommittee: Marcy McCain and Suzanne Calcagno

Glossary Subcommittee: Don Sytsma

NAESB REQ EC and Subcommittee Leadership:

Executive Committee: Ruth Kiselewich, Chair and Jim Minneman, Vice-Chair

Business Practices Subcommittee: Mary Edwards and Dan Jones

Information Requirements Subcommittee: Ed Overtree

Technical Electronic Implementation Subcommittee: Mark Jarrett

Contracts Subcommittee: Ed Overtree

Glossary Subcommittee: Mary Edwards and Patrick Eynon