

# 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](mailto:naesb@aol.com)  
Home Page: [www.naesb.org](http://www.naesb.org)

## NORTH AMERICAN ENERGY STANDARDS BOARD 2004 ANNUAL PLAN – RETAIL ELECTRIC QUADRANT<sup>1</sup>

Item Number & Description	Completion <sup>2</sup>	Assignment
1 Billing & Payment Datasets and Models Develop datasets and models to support the Billing & Payment model business practices.	1 <sup>st</sup> Qtr. 2004	Customer Processes
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).	1 <sup>st</sup> Qtr. 2004	Supplier-Utility Interface
3 Customer Usage Information Develop practices for exchanging and retaining customer usage information. (For example: historical usage, pre-enrollment oriented and billing oriented usage.)  Develop practices for the release, collection, exchange and maintenance of customer information between and among market participants, such as customer authorization, pre-enrollment information, customer lists, enrollment information and post-enrollment information.  Develop procedures and protocols for communicating the nature & level of a customer's service as human needs, firm, interruptible, critical needs, and/or building protection for emergency services.	3 <sup>rd</sup> Qtr. 2004	Customer Processes
4 Distribution Company – Supplier Disputes Develop dispute resolution procedures applicable to differences between Distribution Companies and Suppliers.	2 <sup>nd</sup> Qtr. 2004	Supplier-Utility Interface
5 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.	4 <sup>th</sup> Qtr. 2004	Customer Processes
6 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.	4 <sup>th</sup> Qtr. 2004	Supplier-Utility Interface
7 Customer Inquiries Develop procedures for responding to customer inquiries directed to Distributors and/or Suppliers and for notification of the other party.	2005	Customer Processes

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

<sup>2</sup> 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.

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Item Number & Description	Completion <sup>2</sup>	Assignment
8 Supplier Licensing Develop practices for licensing Suppliers with state utility commissions.	2005	Supplier-Utility Interface
9 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.	2005	Supplier-Utility Interface
10 Load Profiling Develop practices for using statistical methods to estimate interval consumption by customers who do not have interval meters.	2005	Supplier-Utility Interface
11 Settlement Process Reconcile energy schedules and energy delivered by suppliers within a given market. Note: will need to be coordinated with the WEQ.	2005	Supplier-Utility Interface
<b>Technical Electronic Implementation Subcommittee<sup>3</sup></b>		
12 TEIS Subcommittee Process Establish a subcommittee process for the processing of standards released by other quadrant subcommittees, including interfaces with other subcommittees (e.g. CPS, SUIS, Information Requirements (IR), etc), receipt of standards, completion of required inputs (e.g. data dictionaries, etc), and identification of required outputs (e.g. X12 standards, QEDM book components, etc).	1 <sup>st</sup> Qtr. 2004	Technical Electronic Implementation
13 Technical Electronic Implementation Standards – Billing & Payments <b>Status: Dependent on completion of Item 1.</b>	2 <sup>nd</sup> Qtr. 2004	Technical Electronic Implementation
14 Electronic Transport Work jointly with the WGQ EDM subcommittee and the RGQ TEIS subcommittee to establish standards for the NAESB Internet Electronic Transport	2 <sup>nd</sup> Qtr. 2004	Technical Electronic Implementation
15 Quadrant EDM Work jointly with the WGQ and RGQ to establish a common format for Quadrant-specific EDM (QEDM) Books.	2 <sup>nd</sup> Qtr. 2004	Technical Electronic Implementation
16 Technical Electronic Implementation Standards – Customer Enrollment and Switching <b>Status: Dependent on completion of Item 5.</b>	4 <sup>th</sup> Qtr. 2004	Technical Electronic Implementation
17 Technical Electronic Implementation Standards – Metering <b>Status: Dependent on completion of Item 9.</b>	2005	Technical Electronic Implementation
18 Technical Electronic Implementation Standards – Load Profiling	2005	Technical

<sup>3</sup> 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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Item Number & Description	Completion <sup>2</sup>	Assignment
<b>Status: Dependent on completion of Item 10.</b>		Electronic Implementation
19 Technical Electronic Implementation Standards – Customer Information <b>Status: Dependent on completion of Item 6.</b>	2005	Technical Electronic Implementation
<b>Provisional Activities</b>		
Review security standards as may be deemed necessary; Public Key Infrastructure (PKI).		
“Energy Day” Standard - including assessment of changes to existing NAESB standards.		
<b>Program of Standards Maintenance &amp; Fully Staffed Standards Work<sup>4</sup></b>		
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

<sup>4</sup> This work is considered routine maintenance and thus the items are not separately numbered.