| **NORTH AMERICAN ENERGY STANDARDS BOARD 2017 Annual Plan for the Wholesale Gas Quadrant**  **Adopted by the Board of Directors on September 7, 2017 with proposed revisions by WGQ Leadership on September 6, 2017** | | | | | | | |
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| **Item Description** | | | | | | **Completion[[1]](#endnote-1)** | **Assignment[[2]](#endnote-2)** |
| **1. Update Standards Matrix Tool for Ease of Use[[3]](#endnote-3)** | | | | | | | |
|  | a. | Update the reference tool developed for Version 3.0 to reflect modifications applicable to Version 3.1  Status: Not Started | | | 2017 | | WGQ IR/Technical Subcommittee |
| **2. Electronic Delivery Mechanisms** | | | | | | | |
|  | a. | Review minimum technical characteristics in Appendices B, C, and D of the WGQ QEDM Manual, and make changes as appropriate.  Status: Completed | | | 2nd Q, 2017 | | WGQ EDM Subcommittee |
| **3. Gas-Electric Coordination[[4]](#endnote-4) [[5]](#endnote-5) [[6]](#endnote-6) [[7]](#endnote-7)** | | | | | | | |
|  | a. | Develop standards as needed and directed by the Board of Directors, which are specifically assigned to the WGQ. | | |  | |  |
|  |  | i. | GEH Forum Issue 22[[8]](#footnote-1): “*It would be desirable to have a set of terminology agreed upon by participants to characterize shapes, profiles, ratable, non-ratable, and so forth to facilitate discussion”* | |  | |  |
|  |  |  | 1. | Consider and determine if WGQ standards are needed, and develop a recommendation and report to the Board of Directors  Status: Completed | 1st Q, 2017[[9]](#footnote-2) | | WGQ BPS |
|  |  |  | 2. | Develop WGQ standards according to the recommendation of Item 3.a.i.1  Status: Completed | 1st Q, 20172 | | WGQ BPS |
|  |  | ii. | GEH Forum Issue 25[[10]](#footnote-3): *Communication protocols with LDCs, gas generator operators and natural gas marketing companies* | |  | |  |
|  |  |  | 1. | Consider and determine if WGQ standards are needed, and develop a recommendation and report to the Board of Directors  Status: Completed | 1st Q, 20172 | | WGQ BPS |
|  |  |  | 2. | Develop WGQ standards according to the recommendation of Item 3.a.ii.1  Status: Completed | 1st Q, 20172 | | WGQ BPS |
|  |  | iii. | GEH Forum Issue 26[[11]](#footnote-4): “*Improve efficiency of critical information sharing (related to issues 22 and 25)* | |  | |  |
|  |  |  | 1. | Consider and determine if WGQ standards are needed, and develop a recommendation and report to the Board of Directors  Status: Completed | 1st Q, 20172 | | WGQ BPS |
|  |  |  | 2. | Develop WGQ standards according to the recommendation of Item 3.a.iii.1  Status: Completed | 1st Q, 20172 | | WGQ BPS |
|  |  | iv. | GEH Forum Issue 33[[12]](#footnote-5): “*Use of multiple confirmation methods in addition to traditional confirmations for intraday nominations. There is currently a good definition of Confirmation by Exception (CBE) in NAESB standards. CBE however, may not be available everywhere but there may also be additional confirmation methods that could benefit from standardization”* | |  | |  |
|  |  |  | 1. | Consider and determine if WGQ standards are needed, and develop a recommendation and report to the Board of Directors  Status: Completed | 1st Q, 20172 | | WGQ BPS |
|  |  |  | 2. | Develop WGQ standards according to the recommendation of Item 3.a.iv.1  Status: Completed | 1st Q, 20172 | | WGQ BPS |
|  |  | v. | GEH Forum Issue 36[[13]](#footnote-6): “*Level of confirmations: there is a wide range of data elements that are exchanged, from a minimum amount to a very large set of data. In the "Art of Scheduling," pipelines confirm at different levels, with potential for disparities. Greater standardization could produce confirming efficiencies. (For example, confirm at the shipper-to-shipper level. Or, if there are confirmations at a lower level of detail, it would be driven by model type.) See issue 17[[14]](#footnote-7) in the first presentation.”* | |  | |  |
|  |  |  | 1. | Consider and determine if WGQ standards are needed, and develop a recommendation and report to the Board of Directors  Status: Completed | 1st Q, 20172 | | WGQ BPS |
|  |  |  | 2. | Develop WGQ standards according to the recommendation of Item 3.a.v.1  Status: Completed | 1st Q, 20172 | | WGQ BPS |
|  | b. | Address standards development requests related to gas-electric harmonization | | |  | |  |
|  |  | i. | Develop business practices as needed to support [R16003](https://www.naesb.org/pdf4/r16003.doc) and [attachment](https://www.naesb.org/member_login_check.asp?doc=r16003_attachment.docx): *Special Efforts Scheduling Services for Natural Gas Pipeline Transportation - The proposed standard addresses certain business practices relating to Best Efforts scheduling for natural gas pipeline transportation that is: a) scheduled outside of the standard grid-wide nomination cycles, b) permits flow changes outside of standard schedule flow periods; and/or c) involves Shaped Flow Transactions (as defined in the proposed standard).*  Status: Completed | | 1st Q, 20172 | | WGQ BPS |
|  |  | ii. | Develop business practices as needed to support [R16007](https://www.naesb.org/pdf4/r16007.doc): *“Update the NAESB Nomination dataset and related datasets to support the ability for a service requester to submit a single nomination with hourly quantities when such a service is supported by the TSP.”*  Status: Completed | | 1st Q, 20172 | | WGQ BPS |
| **4. Develop and/or modify standards to support FERC Order Instituting Proceeding to Develop Electronic Filing Protocols for Commission Forms (Docket No. AD15-11-000)[[15]](#footnote-8)** | | | | | | | |
|  | a. | Develop business practices as needed to support electronic filing protocols for submittal of FERC Forms  Status: Underway | | | 2017 | | Joint WEQ/WGQ FERC Forms Subcommittee |
| **5. Mexican Addendum or Base Contract** | | | | | | | |
|  | a. | Consider and determine if there is a need for a Mexican Addendum or Base Contract  Status: Completed | | | 2017 | | WGQ Contracts Subcommittee |
|  | b. | Develop the Mexican Addendum or Base Contract according to the analysis completed in Item 5.a  Status: Completed | | | 3rd Q, 2017 | | WGQ Contracts Subcommittee |
| **Program of Standards Maintenance & Fully Staffed Standards Work** | | | | | | | |
|  | Business Practice Requests | | | | Ongoing | | Assigned by the EC[[16]](#endnote-8) |
|  | Continue review against plan for migration to ANSI ASC X12 new versions as needed and coordinate such activities with DISA. | | | | Ongoing | | Assigned by the EC3 |
|  | Information Requirements and Technical Mapping of Business Practices | | | | Ongoing | | Assigned by the EC3 |
|  | Interpretations for Clarifying Language Ambiguities | | | | Ongoing | | Assigned by the EC8 |
|  | Maintenance of Code Values and Other Technical Matters | | | | Ongoing | | Assigned by the EC3 |
|  | Maintenance of eTariff Standards | | | | As Requested | | Assigned by the EC8 |
| **Provisional Activities** | | | | | | | |
| 1. | Develop and/or modify standards as need in support of the October 18, 2016 correspondence[[17]](#footnote-9) from Chairman Bay not otherwise addressed by 2017 WGQ Annual Plan Items 3.a and 3.b. | | | | | | |

**Wholesale Gas Quadrant**

**Executive Committee (WGQ EC)**

**Business Practices Subcommittee (BPS)**

**Contracts Subcommittee**

**Information Requirements Subcommittee (IR)**

**Technical Subcommittee**

**Electronic Delivery Mechanism Subcommittee (EDM)**

**Technical**

**Implementation**

**Task Forces & Working Groups**

**Practices**

**Development**

The translation of business practices to usable uniform business transactions is accomplished through the definition of information requirements for the data, and mapping of that data into specific electronic transactions. This translation is performed by IR and Technical subcommittees and completes the standards development process, often referred to as “full staffing.” Both IR and Technical work in tandem to complete this crucial technical implementation activity. Until these steps have been completed, the process is incomplete, and in many cases, the business practices cannot be used.

**Interpretations Subcommittee**

**FERC Forms Subcommittee**

**NAESB 2017 WGQ EC and Subcommittee Leadership:**

Executive Committee: Jim Buccigross, Chair and Randy Parker, Vice-Chair

Business Practices Subcommittee: Sylvia Munson, Willis McCluskey, Phil Precht, Ben Schoene

Information Requirements Subcommittee: Rachel Hogge

Technical Subcommittee: Kim Van Pelt

Contracts Subcommittee: Keith Sappenfield

Electronic Delivery Mechanism Subcommittee: Leigh Spangler

WGQ/WEQ FERC Forms Subcommittee: Leigh Spangler, Dick Brooks

1. **End Notes, WGQ 2017 Annual Plan:**

   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. [↑](#endnote-ref-1)
2. The assignments are abbreviated. The abbreviations and committee structure can be found at the end of the annual plan document. [↑](#endnote-ref-2)
3. As implementation of business issues are presented to the Information Requirements Subcommittee and Technical Subcommittee, those issues will be given precedence over WGQ 2017 Annual Plan Item No. 1. [↑](#endnote-ref-3)
4. FERC Order No. 809 can be found through the following hyperlink: <https://www.ferc.gov/whats-new/comm-meet/2015/041615/M-1.pdf> [↑](#endnote-ref-4)
5. FERC Order No. 809 ¶107. While NAESB’s modified standards represent an improvement over the currently effective standards, we continue to recognize that additional intraday nomination opportunities could promote more efficient use of existing pipeline infrastructure and provide additional operational flexibility to all pipeline shippers, including gas-fired generators. The modified NAESB standards reflect reduced intraday processing times from the current NAESB standards (i.e., three hours instead of the current four hours), and existing operational limitations, including the manual processes utilized by pipelines for processing nominations, may affect the ability of the gas industry to add additional standard nomination cycles applicable to all shippers. However, the use of computerized scheduling would appear to provide an opportunity for faster and more frequent scheduling of intraday nominations for those shippers and their confirming parties willing to commit to scheduling electronically. We request that gas and electric industries, through NAESB, explore the potential for faster, computerized scheduling when shippers and confirming parties all submit electronic nominations and confirmations, including a streamlined confirmation process if necessary. Providing such an option would enable those entities that need greater scheduling flexibility to have their requests processed expeditiously. [↑](#endnote-ref-5)
6. The steps for the GEH forum shall be:

   1. Provide a forum for industry education from both the natural gas and electric industries regarding gas-electric coordination specific to computerized scheduling, and confirmations including a streamlined confirmation process, if necessary ([FERC Order No. 809 Order on Rehearing, Docket No. RM14-2-001](https://www.naesb.org/pdf4/ferc091715_order809_order_on_rehearing.docx))
   2. Identify potential issues specific to computerized scheduling, and confirmations including a streamlined confirmation process, if necessary which could be based on the education provided in step 1
   3. Identify potential solutions to the issues identified in step 2
   4. Identify potential schedules for standards development including status and progress reports to the board Identify potential schedules for standards development including status and progress reports to the board.

   [↑](#endnote-ref-6)
7. FERC Order on Rehearing ¶1 – September 17, 2015 [Docket No. RM14-2-001] In Order No. 809, the Commission revised its regulations relating to the scheduling of transportation service on interstate natural gas pipelines to better coordinate the scheduling practices of the wholesale natural gas and electric industries, as well as to provide additional scheduling flexibility to all shippers on interstate natural gas pipelines. The Commission also requested that natural gas and electric industries, through the North American Energy Standards Board (NAESB), explore the potential for faster, computerized scheduling when shippers and confirming parties all submit electronic nominations and confirmations, including a streamlined confirmation process if necessary. On May 18, 2015, the Desert Southwest Pipeline Stakeholders (DSPS) filed a request for rehearing of Order No. 809. On August 4, 2015, NAESB filed a report indicating that due to the press of implementing the revised nomination standards by April 1, 2016, it would not begin the development of computerized scheduling standards until after that date. As discussed below, the Commission denies DSPS’ request for rehearing and directs El Paso Natural Gas Company, L.L.C. (El Paso), Transwestern Pipeline Company, LLC (Transwestern), and TransCanada-North Baja Pipelines (TransCanada-North Baja) to make an informational filing within 90 days of the date of this order. In addition, while we recognize the time commitments in implementing the revised nomination timeline, the Commission requests that the natural gas and electric industries, through NAESB, begin considering the development of standards related to faster, computerized scheduling and file such standards or a report on the development of such standards with the Commission by October 17, 2016. [↑](#endnote-ref-7)
8. The GEH Forum Issues may be found in the GEH Survey Addendum: <https://www.naesb.org/pdf4/geh_report_addendum_041816_clean051316.docx> [↑](#footnote-ref-1)
9. The October 18, 2016 letter from Chairman Bay can be found at the following link: <https://naesb.org/pdf4/101816_ferc_chairman_bay_letter_re_order809_naesb.pdf> [↑](#footnote-ref-2)
10. *Id.* [↑](#footnote-ref-3)
11. *Id.* [↑](#footnote-ref-4)
12. *Id.* [↑](#footnote-ref-5)
13. *Id.* [↑](#footnote-ref-6)
14. GEH Forum Issue 17 “Levels of Confirmation” can be found in the GEH Survey Addendum: <https://www.naesb.org/pdf4/geh_report_addendum_041816_clean051316.docx>. [↑](#footnote-ref-7)
15. The FERC *Order Instituting Proceeding to Develop Electronic Filing Protocols for Commission Forms*, issued on April 16, 2015, can be found through the following hyperlink: <https://www.naesb.org/pdf4/ferc041615_electronic_filing_protocols_forms.pdf> [↑](#footnote-ref-8)
16. The EC assigns maintenance of existing standards on a request-by-request basis. [↑](#endnote-ref-8)
17. The October 18, 2016 letter from Chairman Bay can be found at the following link: <https://naesb.org/pdf4/101816_ferc_chairman_bay_letter_re_order809_naesb.pdf> [↑](#footnote-ref-9)