



NORTH AMERICAN ENERGY STANDARDS BOARD

1301 Fannin, Suite 2350 • Houston, Texas 77002 • Phone: (713) 356-0060 • Fax: (713) 356-0067
email: naesb@naesb.org • Web Site Address: www.naesb.org

February 19, 2009
Filed Electronically

The Honorable Kimberly D. Bose
Secretary
Federal Energy Regulatory Commission
888 First Street N.E., Room 1A
Washington, D.C. 20585

RE: Standards for Business Practices of Public Utilities (Docket No. RM 05-5 et al)

Dear Ms. Bose:

The North American Energy Standards Board ("NAESB") herewith submits this report to the Federal Energy Regulatory Commission ("FERC" or "Commission") regarding NAESB's activities from August 2008 to February 2009 with respect to the adoption of Version 002.1 of the NAESB Wholesale Electric Quadrant ("WEQ") standards. The NAESB WEQ Version 002.1 standards have been approved by the WEQ Executive Committee and ratified by membership, or are in the process of ratification and will be published on March 11, 2009, and are provided herein. A supplemental report will be submitted to complete the ratification section on March 11, 2009. An executive summary of the changes which resulted in Version 002.1 is included in the attached report, along with a list of the standards that were created or modified as part of Version 002.1. Three minor corrections are applied to Version 002.1 and are also included in this filing. The remainder of the NAESB business practices under development or planned in response to FERC Order No. 890 will be filed separately, in a subsequent version once complete. Reference to these standards development activities is included in the Version Summary.

The standards in this submittal include modifications of existing standards or new standards to support FERC Order Nos. 890, 890-A and 890-B¹, including the standards to support the North American Electric Reliability Corporation ("NERC") Capacity Benefit Margin ("CBM") standards as requested in the April 29, 2008 issuance from FERC² and part one of a two-part modification to the NAESB standards regarding the grant of rollover rights to requests for redirect on a firm basis. In addition, modifications to the Commercial Timing Table (WEQ-004 Appendix D) and modifications to the NAESB Transmission Loading Relief (WEQ-008) standards and appendices are included to provide clarity and align the NAESB procedures with the NERC reliability standards. Also, included in this submission are the results of a failed recommendation for the addition of an ATC Information List that was created in response to FERC Order No. 890 but not adopted by the WEQ Executive Committee ("EC") due to a lack of support by both a super-majority of the WEQ EC and through a single-segment block by the WEQ Transmission segment.

The development efforts in NAESB reflect the work of multiple market interests. In addition, the NAESB WEQ has worked in close coordination with NERC on business practice standards that are complementary to NERC reliability

¹ Preventing Undue Discrimination and Preference in Transmission Service, Order No. 890, 72 FR 12,266 (March 15 2007), FERC Stats. & Regs. ¶31, 241 (2007) (Order No. 890), order on reh'g, Order 890-A, 73 FR 2984 (Jan. 16, 2008), FERC Stats. & Regs. ¶31,261 at P 592 (2007) (Order 890-A), order on reh'g, Order 890-B, --FR--, FERC Stats. & Regs. ¶1---- (2008).

² FERC Notice of Extension of Time to the North Electric Reliability Corporation (NERC), Docket Nos. RM05-25-000 and RM05-17-000 (April 29, 2008).



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standards so that the standards for both organizations remain in lock-step for consistency in the wholesale electric industry. The inter-organization collaborations are not only permitted in the NAESB process, but strongly encouraged – to provide an environment in which standards development has a more diverse vetting in the industry and a resulting broader acceptance and application.

Some of the standards development activity undertaken that produced Version 002.1 had considerable industry debate before an agreement was reached on the level of standardization needed and the actual text of the standards themselves. The NAESB process supports a wide range of perspectives, and through a public process permitting all segments of the marketplace to voice equally their issues, balanced voting allows a disparate group to move towards consensus.

All requests for new standards or modifications of existing standards and requests for interpretation are posted on the NAESB home page. All work papers and recommendations from subcommittees and task forces regarding the requests are also posted on the NAESB home page (www.naesb.org). Participation in the task forces and subcommittees, where requests are addressed and recommended standards are formulated and voted out of committee, is open to any interested party regardless of membership. Should a participant be unable to attend a meeting where a request of interest is discussed, the party may prepare written comments, which will be posted as work papers for the subcommittee or task force.

The Executive Committee meetings where these standards were discussed and adopted took place from September 2008 to February 2009. The minutes of these meetings are provided as links, which include the voting records of the Executive Committee. The ratification ballots and member ratification voting record results are also included as links. All comments that were filed on the standards as part of the NAESB formal comment period are also included as links.

The cover letter, report and enclosures are being filed electronically as a single document in Microsoft® Word® 2003 and also in Adobe Acrobat® Print Document Format (.pdf), with each enclosure bookmarked separately. The filing is also available on the NAESB web site (www.naesb.org). Please feel free to call me at (713) 356-0060 or refer to the NAESB website (www.naesb.org) should you have any questions or need additional information regarding the NAESB WEQ Version 002.1 standards.

Respectfully submitted,

Rae McQuade

Ms. Rae McQuade
President & COO, North American Energy Standards Board



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cc without enclosures: Chairman Jon Wellinghoff, Federal Energy Regulatory Commission
Commissioner, Joseph Kelliher, Federal Energy Regulatory Commission
Commissioner Suede Kelly, Federal Energy Regulatory Commission
Commissioner Philip D. Moeller, Federal Energy Regulatory Commission
Commissioner Marc Spitzer, Federal Energy Regulatory Commission

Mr. Shelton Cannon, Office Director, Office of Energy Market Regulations, Federal Energy Regulatory Commission

Ms. Cynthia Marlette, General Counsel of the Commission, Federal Energy Regulatory Commission

Mr. Joseph McClelland, Director, Office of Electric Reliability, Federal Energy Regulatory Commission

Mr. W. Mason Emmett, Office of General Counsel - Energy Markets, Federal Energy Regulatory Commission

Mr. Ryan Irwin, Office of Energy Market Regulation, Federal Energy Regulatory Commission

Mr. Michael Goldenberg, Senior Attorney, Office of General Counsel, Federal Energy Regulatory Commission

Ms. Valerie Roth, Office of Energy Market Regulation, Federal Energy Regulatory Commission

Mr. Michael Desselle, Chairman and CEO, North American Energy Standards Board

Mr. William P. Boswell, General Counsel, North American Energy Standards Board

Mr. David Cook, General Counsel, North American Electric Reliability Corporation

Mr. Andrew Rodriguez, North American Electric Reliability Corporation

Enclosures (all documents and links available publicly on the NAESB web site – www.naesb.org):

- Appendix A Executive Committee Meeting Minutes, Comments and Voting Records Links
- Appendix B Ratification Ballots and Results Links
- Appendix C List of Available Meeting Transcripts
- Appendix D Recommendation, Comments, and WEQ Executive Committee Voting Record Regarding the Available Transfer Capability Information List
- Appendix E NAESB Process for Standards Development
- Appendix F Order 890 Plan and Status of Items
- Appendix G 2008 WEQ Annual Plan
- Appendix H 2009 WEQ Annual Plan
- Appendix I Minor Corrections Applied for Version 002.1

**UNITED STATES OF AMERICA
FEDERAL ENERGY REGULATORY COMMISSION**

**Standards for Business Practices and)
Communication Protocols for Public Utilities)**

**Docket No. RM 05-17-000
Docket No. RM 05-5-000**

REPORT OF THE NORTH AMERICAN ENERGY STANDARDS BOARD

The North American Energy Standards Board ("NAESB") is voluntarily submitting this report in accordance with the Commission's Order Nos. 890, 890-A and 890-B¹ in the above referenced docket, as well as Order 676². The report includes a summary of the changes that resulted in Version 002.1 of the wholesale electric quadrant standards, along with a list of the standards that were created or modified as part of Version 002.1 -- cross-referenced both by request number and by version. The standards can be downloaded from the NAESB home page (www.naesb.org).

In January 2002, the Gas Industry Standards Board ("GISB") became the Wholesale Gas Quadrant (WGQ) of NAESB and three other quadrants were formed, the Wholesale Electric Quadrant (WEQ), the Retail Gas Quadrant, and Retail Electric Quadrant. NAESB WEQ Version 0 standards³ were adopted by the WEQ and published on January 15, 2005. NAESB WEQ Version 1 standards⁴ were adopted by the WEQ and published on October 31, 2007 and subsequently filed with the Commission on December 21, 2007. NAESB WEQ Version 002 standards⁵ were adopted by the WEQ and filed with the Commission on August 29, 2008 and subsequently published on September 30, 2008.

There are nine enclosures supporting the report. Provided in appendix A is a list of the links to the minutes from the Executive Committee ("EC") meetings during which recommendations were considered that resulted in Version 002.1 of the NAESB WEQ standards. The EC minutes include discussion of recommendations from task forces and subcommittees, which ultimately resulted in the standards for Version 002.1. The EC voting records are attached as part of the minutes. Also included in appendix A is the list of links to all comments filed on the standards that were recommended for adoption to the EC. Provided in appendix B is the list of links to the NAESB membership ratification ballots, which include the EC adopted recommendations that are the basis for the Version 002.1 changes. Also provided in this appendix is the list of links to the ratification results. Appendix C provides the list of available transcripts. Provided in appendix D is the recommendation for the Available Transfer Capability Information List, the comments submitted in response to the recommendation, and the results of the WEQ Executive Committee vote in which the recommendation failed to receive the required supermajority and segment support. Appendix E provides an overview of the NAESB process by which the standards were adopted. Provided in appendix F is the Order No. 890 work plan and status. Appendices G and H contain the 2008 WEQ Annual Plan and the 2009 WEQ Annual Plan respectively, and Appendix I includes the references to the minor corrections that were applied and referenced in Version 002.1.

This report is intended solely as a status report from NAESB regarding Version 002.1 of its standards. NAESB does not advocate that the Commission take a particular position on any of the issues presented.

¹ FERC Order Nos. 890, 890-A, 890-B, *supra* note 1.

² FERC Order No. 676, 18 C.F.R. §35, §37, §38 (2006).

³ NAESB Version 0 standards in Response to FERC Order No. 890, Docket Nos. RM05-25-000 and RM05-17-000, *available at* http://www.naesb.org/member_login_form.asp?doc=ferc011805_report.pdf (submitted January 18, 2005). This document is password protected.

⁴ NAESB Version 001 Standards in Response to FERC Order No. 890, Docket Nos. RM05-17-000 and RM05-25-000, *available at* http://www.naesb.org/member_login_form.asp?doc=ferc122107.pdf (submitted December 21, 2007). This document is password protected.

⁵ NAESB Version 002 Standards in Response to FERC Order No. 890, Docket Nos. RM05-25-000 and RM05-17-000, *available at* http://naesb.org/pdf3/ferc082908_order_890_filing.pdf (submitted August 29, 2008).

VERSION 002.1 SUMMARY

Presented here is a summary of the activities that led to the compilation of the NAESB Wholesale Electric Quadrant (WEQ) Standards Version 002.1. All references in this summary pertain only to the WEQ. Supporting documents can be found in appendices A, B, C, D, E, F, G, H and I as enclosures to this report. All Version 002.1 standards that were added or modified are contained in a table following this summary. The table cross references the standards to the related requests for development and the actions that were taken.

On April 29, 2008 the Commission granted public utilities working through NERC and NAESB an extension of time to complete the FERC Order No. 890 reliability standards and business practices related to the calculation of Available Transfer Capability (“ATC”)¹. The extension set a November 27, 2008 deadline for the FERC Order No. 890 ATC related business practices, excluding those business practices related to Capacity Benefit Margin (“CBM”), which were given a February 19, 2009 deadline. On August 29, 2008 NAESB filed the WEQ Version 002 standards with the Commission. The August 29, 2008 submittal included the FERC Order No. 890 ATC related standards, excluding the CBM standards. Included in this report are the business practices related to CBM². The NAESB Electronic Scheduling Subcommittee/Information Technology (“ESS/ITS”) and Business Practice Subcommittees (“BPS”) worked in close coordination with the North American Electric Reliability Corporation (“NERC”) ATC Drafting Team on the CBM business practice standards, as with all other FERC Order No. 890 ATC related standards, to ensure that the standards for both organizations are coordinated and consistent. The WEQ EC will continue to work with NERC to ensure that MOD-004 and WEQ-004 (Coordinate Interchange) with regards to approval of the CBM schedules remain complementary.

The ESS/ITS also developed new standards and modified existing standards pertaining to the grant of rollover rights to requests for redirect on a firm basis in response to FERC Order Nos. 676³, 890⁴, and 890-A⁵, and are included in this report. This effort has been divided into two parts. The definition and standards modifications included in this submittal constitute part one of the two part process. The modifications to WEQ-001-9.7 requested in FERC Order No. 890⁶ and included in the Order 890 work plan⁷, part two of the standards, will be included in WEQ Version 002.2, expected to be complete at yearend 2009 and published in first quarter 2010.

Other standards to be included in a subsequent filing that do not have a FERC Order No. 890 deadline, but are FERC Order No. 890 related include: network service on OASIS; pre-emption; procedures to implement displacement/interruption terms of the pro forma tariff; part two of the rollover rights for redirected transmission service; coordination of transmission requests across multiple transmission systems; rebid of partial service to allow a transmission customer to rebid a counteroffer of partial service; posting of curtailment information on OASIS; redispatch cost posting to allow third party offers of planning redispatch services and submittal windows. Also outstanding that may contribute new or modified standards is a review of WEQ standards as they relate to paragraph 1390 of FERC Order No. 890⁸ to determine if modifications are required. These standards will be published in the NAESB WEQ Standards Version 002.2.

This report also includes two items not related to FERC Order No. 890, 2008 WEQ Annual Plan Item 1(a)(ii) and 2008 Annual Plan Item 6(m)/R07007. The first item, modifications to WEQ-008 (Transmission Loading Relief – Eastern Interconnection)⁹, was developed to add clarity and to ensure that the business practice standards are complementary to NERC reliability standard IRO-006.¹⁰ The second item, modifications to the Coordinate Interchange Timing Tables¹¹ contained in Appendix D of WEQ-004, was added to for clarity, by splitting the

¹ FERC Notice of Extension of Time to the North Electric Reliability Corporation (NERC), *supra* note 2.

² 2008 WEQ Annual Plan Item 2(b)(iii)(1)-(4) available at http://www.naesb.org/pdf3/weq_2008_annual_plan.doc (December 18, 2008).

³ FERC Order No. 676, *supra*, note 4.

⁴ FERC Order No. 890, *supra*, note 1.

⁵ FERC Order No. 890-A, *supra*, note 1.

⁶ FERC Order No. 890, *supra* note 1, ¶1269.

⁷ NAESB Order 890 Work Plan, available at http://naesb.org/pdf4/order890_021109_naesb_workplan_clean.doc (February 11, 2009),

⁸ FERC Order No. 890, *supra*, note 1, ¶1390.

⁹ NAESB 2008 WEQ Annual Plan Item 1(a)(ii), *supra*, note 9.

¹⁰ NERC Standard IRO-006-4, Reliability Coordination – Transmission Loading Relief, available at <http://www.nerc.com/files/IRO-006-4.pdf> (approved by NERC Board of Trustees October 28, 2007).

¹¹ NAESB 2008 WEQ Annual Plan Item 6(m)/R07007, *supra*, note 9.

Commercial Timing Table into two parts; one detailing the timing requirements for the Western Electricity Coordinating Council (“WECC”) and the other detailing the timing requirements for all interconnections except WECC, both parts complementary to NERC reliability standards.¹²

Also, included in this report as appendix D are the recommendation, industry comments and the WEQ EC voting results concerning the failed ATC Information List standard. The ATC Information List, while not required by FERC Order No. 890, was developed as a byproduct of the business practices developed in response to FERC Order No. 890 by the ESS/ITS and BPS and was intended to support transparency reporting and related functions that may be required as a result of the Order. The recommendation was reviewed at the October 6, 2008 single topic WEQ EC conference call, but failed to receive the required forty percent support from the Transmission segment. As a result the recommendation failed and is included in this report as the failure resulted in part due to a single-segment block

The ESS/ITS and BPS has worked in close coordination with the North American Electric Reliability Corporation (“NERC”) on the FERC Order No. 890 ATC related business practice standards that are complementary to the NERC reliability standards so that the standards for both organizations are consistent. This work included not only joint meetings of NERC drafting teams with NAESB subcommittees, but also joint NERC/NAESB subcommittees. The NERC/NAESB Joint Interchange Scheduling Working Group (“JISWG”) is a standing joint subcommittee made of both NERC and NAESB participants that worked on modifications to the coordinate interchange business practice standards and reliability standards in addition to work on the NERC Registry and other NERC reliability standards. The JISWG continues to meet on a regular basis to ensure consistency in these areas. The NAESB BPS and the NERC TLR drafting team also coordinate efforts to ensure that the WEQ-008 TLR business practices remain consistent and complementary to the NERC IRO-006 TLR reliability standards. NERC staff also participates on the NAESB WEQ Executive Committee as a member of the Executive Committee with voting rights and privileges. This participation ensures that the work of both organizations remains closely coordinated. These inter-organization collaborations are not only permitted in the NAESB process, but also encouraged – to provide an environment in which standards development has a broader vetting in the industry and a resulting broader application.

In response to the Commission’s request, the NAESB WEQ leadership developed the FERC Order No. 890 work plan, which includes citations to the FERC Order Nos. 890, 890-A and 890-B and corresponds with the 2008 and 2009 WEQ Annual Plans.¹³ The remaining standards to be included in a subsequent filing that do not have a FERC Order No. 890 deadline, but are FERC Order No. 890 related include: network service on OASIS; pre-emption; procedures to implement displacement/interruption terms of the pro forma tariff; part two of rollover rights for redirected transmission service; coordination of transmission requests across multiple transmission systems; rebid of partial service to allow a transmission customer to rebid a counteroffer of partial service; posting of curtailment information on OASIS; redispatch cost posting to allow third party offers of planning redispatch services and submittal windows. Also outstanding that may contribute new or modified standards is a review of WEQ standards as they relate to paragraph 1390 of FERC Order No. 890¹⁴ to determine if modifications are required.

As with most NAESB standards development of this magnitude, some of the standards development activity undertaken that produced Version 002.1 had considerable industry debate before an agreement was reached on the level of standardization needed and the actual text of the standards themselves. The NAESB process supports a wide range of perspectives, and through a public process permitting all segments of the marketplace to voice equally their issues, balanced voting allows a disparate group to move towards consensus.

The summary is organized into six sections: completed FERC Order No. 890 related standards with the February 19, 2009 deadline, completed FERC Order No. 890 related standards without deadlines, completed standards not related to FERC Order No. 890, standards under development or planned related to FERC Order No. 890 that will be the subject of Version 002.2, the failed ATC Information List standard, and items identified for

¹² NERC Standard INT-005-3, Interchange Authority Distributes Arranged Interchange, available at <http://www.nerc.com/files/INT-005-3.pdf>; NERC Standard INT-006-3, Response to Interchange Authority, available at <http://www.nerc.com/files/INT-006-3.pdf>; NERC Standard INT-008-3, Interchange Authority Distributes Status, available at <http://www.nerc.com/files/INT-008-3.pdf> (approved by NERC Board of Trustees October 29, 2008).

¹³ NAESB 2008 WEQ Annual Plan, available at http://www.naesb.org/pdf3/weq_2008_annual_plan.doc (December 18, 2008); NAESB 2009 WEQ Annual Plan, available at http://www.naesb.org/pdf4/draft_weq_2009_annual_plan.doc (approved by the WEQ Executive Committee February 3, 2009 to be considered for approval by the NAESB Board of Directors on March 26, 2009).

¹⁴ FERC Order No. 890, *supra* note 1, ¶1390.

NAESB standards development for which NAESB has decided needed no standards development is necessary. Descriptions of each grouping are shown below:

FERC Order No. 890 related standards with the February 19, 2009 Deadline

On November 7, 2008, the NAESB Executive Committee (“EC”) adopted the business practice standards to address the CBM requirements contained in paragraphs 257 and 262 of FERC Order No. 890¹ and paragraphs 68 and 83 of FERC Order No. 890-A². In paragraph 257 of FERC Order No. 890³ the Commission requested that transmission providers working through NERC and NAESB, “develop clear standards for how the CBM value shall be determined, allocated across transmission paths, and used,” and that the transmission providers will “reflect the set-aside of transfer capability as CBM in the development of the rate for point-to-point transmission service.” In paragraph 262 of FERC Order No. 890 the Commission requested that public utilities working through NAESB, “develop an OASIS mechanism that will allow for auditing of CBM usage.” These requests were addressed through the addition of a new title and two new standards to the OASIS Business Practice Standards (WEQ-001) and modifications to OASIS S&CP (WEQ-002), the OASIS Data Dictionary (WEQ-003), the Coordinate Interchange standards (WEQ-004), the Transmission Loading Relief standards (WEQ-008), and the OASIS Implementation Guide (WEQ-013). The ESS/ITS and BPS met 4 times, including 1 meeting with the NERC ATC drafting team and the JISWG met twice to address this item. The recommendation developed by the subcommittee passed a subcommittee vote on July 30, 2008 and was sent out for a thirty-day industry comment period on August 5, 2008. The WEQ EC adopted the recommendation via notational ballot on November 7, 2008 and the recommendation was ratified December 15, 2008. On February 3, 2009 the WEQ EC agreed to continue to work with NERC to ensure that MOD-004 and WEQ-004 (Coordinate Interchange) with regards to approval of the CBM schedules remain complementary.⁴

FERC Order No. 890 related OASIS standard without a deadline

NAESB is submitting one FERC Order No. 890 related standard that does not have a deadline. It is described below.

In response to clarifications provided by the Commission regarding the grant of rollover rights to requests for redirect on a firm basis in FERC Order Nos. 676¹, 890, and 890-A², the WEQ ESS/ITS developed a new definition for Unexercised Rollover Rights to be added to the OASIS Business Practice Standards (WEQ-001), and made modifications to existing standards in WEQ-001, the OASIS Data Dictionary (WEQ-003), and the OASIS Implementation Guide (WEQ-013). These modifications were made as part one of a two part process to address the FERC policy concerning rollover reform. The modifications to WEQ-001-9.7 requested in paragraph 1269 of FERC Order No. 890³ and included in the Order 890 work plan⁴ will be included in Version 002.2. The ESS/ITS met 4 times, over eight days to address this item. The recommendation developed by the subcommittee passed a subcommittee vote on September 3, 2008 and was sent out for a thirty-day industry comment period on September 5, 2008. The WEQ EC adopted the recommendation via notational ballot on November 26, 2008 and the recommendation was ratified January 12, 2009.

Standards not related to FERC Order No. 890

There are two items included in this filing that are not related to FERC Order No. 890. They are described below.

First, the WEQ BPS modified the NAESB WEQ-008 TLR business practice standards to add clarity to the intended use of the of the nine TLR levels addressed in the standards and made further modifications to make a

¹ FERC Order No. 890, *supra* note 1, ¶¶257, 262.

² FERC Order No. 890-A, *supra* note 1, ¶¶68, 83.

³ FERC Order No. 890, *supra* note 1, ¶257.

⁴ Draft WEQ Executive Committee Meeting Minutes available at http://www.naesb.org/pdf4/weq_ec020309dm.doc (February 3, 2009)

¹ See *supra* note 4.

² See *supra* note 1.

³ FERC Order No. 890, *supra* note 1, ¶1269.

⁴ See *supra* note 14.

correction and ensure consistency between the NAESB business practice standards and the NERC IRO-006 TLR reliability standards¹. These modifications were made as part of NAESB's continuous support of TLR procedure in alignment with NERC IRO-006 TLR reliability standards². The recommendation passed a subcommittee vote on September 22, 2008 and was sent out for a thirty-day industry comment period on September 23, 2008. The WEQ Executive Committee approved the recommendation on November 26, 2008 via notational ballot and it was ratified on January 12, 2009.

Second, the WEQ JISWG modified the Timing Table Interchange Timeline with Minimum Reliability-Related Response Times in Appendix D of the NAESB WEQ-004 Coordinate Interchange standards by dividing it into two tables; one table providing the timing requirements for the WECC and the other providing the timing requirements for all interconnections except WECC.³ The timing tables were also modified to reflect time changes for Generator-Provider Entity, Load-Serving Entity, and Purchase-Selling Entity market assessments so that they are concurrent with the Balancing Authority and Transmission Service Provider reliability assessments. A timeline diagram was also added to Appendix D for the purpose of clarification. The recommendation passed a subcommittee vote on October 9, 2008 and was sent out for a thirty-day industry comment period on October 10, 2008. The WEQ Executive Committee approved the recommendation on February 3, 2009. Ratification by the membership of these modifications is expected on March 11, 2009.

Standards under development or planned related to FERC Order No. 890 that are not yet complete and will be the subject of Version 002.2

There are five items that are currently under development or planned related to FERC Order No. 890 that are not yet complete and will be the subject of Version 002.2. Those items are, network service on OASIS⁴ (included in group 3 of the Order 890 work plan), pre-emption⁵, request R05019⁶ and revisions to standard 9.7⁷ (included in group 4 of the Order 890 work plan), paragraph 1377 of the FERC Order 890⁸ (included in group 5 of the Order 890 work plan), paragraphs 1390, 1627, and 1005 of FERC Order 890⁹ (included in group 6 of the Order 890 work plan) and submittal windows¹⁰ (included in group 7 of the Order 890 work plan) do not have deadlines – but are all in standards development or planned for standards development.

For the first non-deadline item, NAESB is developing OASIS business practice standards and the OASIS technical aspects for “transmission providers and network customers to use OASIS to request designation of new network resources and to terminate designation of network resources.”¹¹ The standards under development will include the ability to electronically query requests to designate and terminate network resources. The OASIS templates under development will allow for queries of all information provided with designation requests; and the ability to mask information about “operating restrictions and generating costs on OASIS.”¹² The proposed business practice standards are currently under development. For future status updates, please reference the 2009 WEQ Annual Plan¹³ and Order 890 work plan¹⁴. These items relate to group 3 of the Order 890 work plan.

¹ See *supra* note 16.

² See *supra* note 17.

³ See *supra* note 18.

⁴ 2008 WEQ Annual Plan Item 2(a)(iii), *supra* note 20.

⁵ FERC Order No. 890, *supra* note 1, ¶1407; FERC Order No. 890-A, *supra* note 1, ¶814-8; FERC Order No. 890-B, *supra* note 1, ¶161; 2009 WEQ Annual Plan Item 2(a)(ii)(1), *supra* note 20.

⁶ 2009 WEQ Annual Plan Items 2(a)(ii)(2), 3(a)(iii) / R05019, *supra* note 20.

⁷ FERC Order No. 890, *supra* note 1, ¶1269; FERC Order No. 890-A, *supra* note 1, ¶697-99, 700, 702, 704-8, 2009 WEQ Annual Plan Item 2(a)(ii)(3), *supra* note 20.

⁸ FERC Order No. 890, *supra* note 1, ¶1377; 2008 WEQ Annual Plan Item 2(a)(v)(1), *supra* note 20

⁹ *Id.* at ¶¶1390, 1627, 1005; 2008 WEQ Annual Plan Item 2(a)(vi)(1)-(3), *supra* note 20.

¹⁰ FERC Order No. Order 890-A, *supra* note 1, ¶805; 2008 WEQ Provisional Item 7, *supra* note 20.

¹¹ See *supra* note 33.

¹² See *supra* note 37.

¹³ See *supra* note 20.

¹⁴ See *supra* note 14.

Not started yet, NAESB plans revisions to the OASIS business practice standards and OASIS S&CPs so that “a new confirmed request for transmission service would preempt a request of equal duration that has been accepted by the transmission provider but not yet confirmed by the transmission customer.”¹⁵ The business practice standards to be developed will be coordinated with work efforts related to NAESB Request No. R05019 to modify OASIS standards and OASIS S&CPs to clearly document the procedures used to implement the displacement/interruption terms of the Pro Forma tariff. As part of the development, the NAESB ESS/ITS expects to modify OASIS standards and OASIS S&CPs to clearly document the procedures used to implement the displacement/interruption terms of the Pro Forma tariff.

NAESB has begun the revisions for NAESB WEQ business practice standard WEQ 001-9.7 (which addresses rollover rights for Redirected transmission service) to be consistent with the Commission policies. During the November 5, 2008 meeting, the WEQ EC determined that the standards and modifications related to rollover rights for redirected transmission service should be bifurcated, making the modifications to WEQ 001-9.7 a separate item from the standards and modifications related to rollover rights for redirected transmission service included in this report. A task force was created to address the changes to be made to WEQ 001-9.7, including addressing the rollover rights available to a transmission customer when the transmission customer wishes to use a redirected path at the time of renewal of a reservation. To gain better understanding of the nature of the changes, the group met with FERC staff on January 8, 2009 and exchanged work papers. The EC remanded the item to the ESS/ITS during the February 3, 2009 EC meeting with the information provided by FERC staff, and the subcommittees are currently addressing the modifications.¹⁶ The target completion date as listed in the Order 890 work plan is 1st quarter 2009. For future status updates, please reference the 2009 WEQ Annual Plan¹⁷ and Order No. 890 Work Plan¹⁸. The revisions to standard 9.7, pre-emption, and NAESB Request No. R05019 are included in group 4 of the Order 890 work plan.

Not started yet, NAESB will develop business practice standards to facilitate the coordination of requests across multiple transmission system using the principles set forth in Paragraph 1377 of FERC Order No. 890.¹⁹ NAESB will also develop S&CPs related to coordination of request across multiple transmission systems. The target completion date as listed in the Order 890 work plan is 4th quarter 2009. NAESB will develop business practice standards “to allow transmission customer to rebid a counteroffer of partial service so the transmission customer is allowed to take the same quantity of service across all linked transmission service requests.” For future status updates, please reference the 2009 WEQ Annual Plan²⁰ and Order No. 890 Work Plan²¹. These items relate to group 5 of the Order 890 work plan.

Additionally, NAESB will review the existing business functions set forth in the NAESB WEQ standards to determine if standards should be created or modified as related to Paragraph 1390 of FERC Order No. 890.²² NAESB expects to develop OASIS business practice standards and OASIS S&CPs for the “posting of additional curtailment information on OASIS” via a “detailed template for the posting of additional information on OASIS regarding firm transmission curtailments.” NAESB will develop business practice standards for redispatch cost posting which will include OASIS S&CPs to allow for posting of third party offers of planning redispatch services. The business practice standards developed for redispatch cost posting may affect the existing NAESB business practice standards for Transmission Loading Relief (TLR). The proposed business practice standards highlighted here have not yet started. For future status updates, please reference the 2009 WEQ Annual Plan²³ and Order No. 890 Work Plan²⁴. These items related to group 6 of the Order 890 work plan.

¹⁵ See *supra* note 34.

¹⁶ See *supra* note 25.

¹⁷ See *supra* note 20.

¹⁸ See *supra* note 14.

¹⁹ NAESB 2009 WEQ Annual Plan Item 2(a)(iii)(1), *supra* note 20; FERC Order No. 890, *supra* note 1, ¶¶1377-78, FERC Order No. 890-A, *supra* note 1, ¶¶762, 766.

²⁰ See *supra* note 20.

²¹ See *supra* note 14.

²² FERC Order No. 890, *supra* note 1, ¶1390; NAESB 2008 WEQ Annual Plan Item 2(a)(iv)(1), *supra* note 20

²³ See *supra* note 20.

²⁴ See *supra* note 14.

Lastly, NAESB will develop standardized practices for allocating capacity among requests received during the submittal window²⁵. The proposed business practice standards highlighted here have not yet started. For future status updates, please reference the 2009 WEQ Annual Plan²⁶ and Order No. 890 Work Plan²⁷. These items relate to group 7 of the Order 890 work plan.

Failed Available Transfer Capability List Standard

The ATC Information List was developed by a WEQ EC Information List Task Force created by the WEQ EC. The WEQ EC ATC Information List Task Force group met on June 6, 2008 and determined to pursue standardizing the list, not through the proscriptive means of detailing each piece of information that should be made available or not made available publicly, to be uniformly applied to all transmission providers. Instead the task force determined to pursue the list through a standardized transparency report that the transmission providers would post on OASIS. The report would be standardized, and each transmission provider would complete the report specific to its own operations, and would maintain the currency of the information posted. In this approach, the transmission providers would not have a “one size fits all” approach to the information to be made public or to remain not-public, and the market participants would have access through a standardized report to the transmission providers’ decisions on access to ATC related information. The task force group met on July 18 and August 14, 2008 to finalize this approach and draft the needed business practices. The ATC Information List standard was sent out for an industry comment period on August 18, 2008 with the comments due September 17, 2008. The recommendation was discussed at a single topic WEQ EC review session on September 29, 2008 and voted on at a single topic conference call on October 6, 2008. Due to an insufficient number of votes, a notational ballot was distributed on October 8, 2008. On October 20, 2008 the votes were tallied and the recommendation did not garner an affirmative vote of at least sixty-seven percent (67%) of the EC, nor an affirmative vote of at least forty percent (40%) from the Transmission segment within the WEQ Quadrant, as required by the NAESB Certificate of Incorporation¹ and the NAESB Bylaws.² The recommendation, the comments submitted in response to the recommendation and the WEQ EC voting record is included as appendix D to this submittal.

Items Identified for NAESB Standards Development that the Organization has Decided Needed No Action

Since the publication of NAESB WEQ Version 2.0, several WEQ Annual Plan items were deemed to require no standards development action by NAESB as they have been addressed by other NAESB efforts, or evaluated and dismissed. When a subcommittee determines that no action is to be taken on a particular item, that item is posted for a 30 day industry comment period. The EC reviews any comments submitted and the item must pass a simple majority vote of the EC. Items for which no action is required do not require membership ratification, as that process is reserved for creations of, modifications to or deletion of existing standards. There were nine items that were determined to require no action by NAESB:

EC Date	Recommendation	Recommendation Description
November 4, 2008	2008 WEQ Annual Plan Item 6(f)	Review and evaluate whether to cutoff or put a size limit on the entities for which the standards apply, ³
November 4, 2008	2008 WEQ Annual Plan Item 1(f)	Review Market System Back-Up existing language and review of existing back-up language, ⁴
November 4,	2008 WEQ Annual Plan	Provide complementary business practice standards to support the

²⁵ See *supra* note 39.

²⁶ See *supra* note 20.

²⁷ See *supra* note 14.

¹ Certificate of Incorporation of the North American Energy Standards Board Inc. (NAESB), available at http://www.naesb.org/pdf/naesb_certificate_112108.pdf (ratified November 21, 2008).

² Bylaws of the North American Energy Standards Board Inc. (NAESB), available at <http://www.naesb.org/pdf/naesbbylaws.pdf> (ratified November 21, 2008).

³ 2008 WEQ Annual Plan Item 6(f), *supra* note 20.

⁴ 2008 WEQ Annual Plan Item 1(f), *supra* note 20.

E - (Appendix E)
F - (Appendix F)
G - (Appendix G)
P - Principle
M - Model

x	Business Topic – Standard Number	
	001	OASIS
	002	OASIS Standards and Communication Protocols (S&CP)
	003	OASIS S&CP Data Dictionaries
	004	Coordinate Interchange
	005	ACE Equation Special Cases
	006	Manual Time Error Corrections
	007	Inadvertent Interchange Payback
	008	Transmission Loading Relief
	009	Standards of Conduct
	010	Contracts Related Standards
	011	Gas / Electric Coordination
	012	Public Key Infrastructure (PKI)
	013	OASIS Implementation Guide
	014	WEQ/WGQ eTariff Related Standards
	015	Interpretations
y	Subordinate category or section to provide granularity, some of which may be specific categories as noted below:	
	001 0	Definition of Terms
	001 1	Provision of Open Access Transmission Service
	001 2	Transmission and Ancillary Services Attributes
	001 3	OASIS Registration Procedures
	001 4	On-Line Negotiation and Confirmation Process
	001 5	Procurement of Ancillary and Other Services
	001 6	Pathnaming Standards
	001 7	Next Hour Market Service
	001 8	Requirement for Dealing with Multiple Identical Transmission Service Requests
	001 9	Requirements for Dealing with Redirects on a Firm Basis
	001 10	Redirects on a Non-Firm Basis
	001 11	Resales
	001 12	Transfers
	001 13	OASIS General Posting Standards
	001 14	Posting the ATC and TTC Narratives
	001 15	ATC Change Narrative
	001 16	ATC Methodology Questions
	001 17	Actual and Forecasted Load
	001 18	Postback Requirements
	001 19	Grandfathered Agreements
	001 20	Rollover Rights
	001 21	Granting and Measurement of Long-term Firm Point-to-Point Transmission Service with the Conditional Curtailment Option
	001 A	Standard 8 Examples (Queue Hoarding)
	001 B	Redirect Standards Examples
	001 C	OASIS Standards Exemptions
	001 D	Postback Conditions for Use in Calculation of ATC or AFC, As Appropriate
	002 0	Definition of Terms
	002 1	RESERVED
	002 2	Network Architecture Requirements
	002 3	Information Access Requirements
	002 4	Interface Requirements

002	5	Performance Requirements
003	0	OASIS Data Dictionary
004	0	Definition of Terms
004	1 to 17	Business Practice Requirements
004	A	Electronic Tagging Service Performance Requirements and Failure Procedures
004	B	Transaction e-Tag Actions
004	C	Required and Correctable Tag Data
004	D	Commercial Timing Table
005	0	Definition of Terms
005	1	Jointly Owned Units
005	2	Supplemental Regulation Service
005	3	Load or Generation Transfer by Telemetry
005	A	Examples of Accounting of Jointly Owned Units as Pseudo-Tie or Dynamic Schedule
006	0	Definition of Terms
006	1 to 3	Business Practice Requirements
006	4	Time Error Initiation
006	5	Interconnection Time Monitoring
006	6	Time Error Correction Labeling
006	7	Time Correction Offset
006	8	Interconnection Time Error Notification
006	9 to 10	Western Interconnection Time Error Notification
006	11	Time Correction on Reconnection
006	12	Leap Seconds
007	0	Definition of Terms
007	1	Inadvertent Interchange Payback
007	2	Other Payback Methods
007	A	Inadvertent Interchange On-and Off-Peak Periods
008	0	Definition of Terms
008	1	General Requirements Regarding Use of Interconnection-wide TLR Procedures
008	2	Interchange Transaction Priorities for Use With Interconnection-wide TLR Procedures
008	3	Eastern Interconnection Procedure for Physical Curtailment of Interchange Transactions
008	A	Examples of On-Path and Off-Path Mitigation
008	B	Example Calculations of the Per Generator Method
008	C	Transaction Curtailment Formula
008	D	Regional Differences
009	0	RESERVED
009	1	RESERVED
009	2	RESERVED
009	3	RESERVED
009	4	RESERVED
009	5	RESERVED
009	6	RESERVED
010	1	Funds Transfer Agreement
011	0	Definition of Terms
011	1	Business Practice Requirements
012	0	Definition of Terms
012	1	Business Practice Requirements
013	0	Usage of Terms
013	1	RESERVED
013	2	OASIS Transaction Processing
013	3	Specific Template Implementation
013	4	Example Implementation
013	A	Example for WEQ-001-14: ATC Change Narrative
013	B	Example for WEQ-001-14: Zero Change Narrative

014	0	Usage of Terms
014	1	eTariff Related Standards
014	A	Implementation Guide for Electronic Tariff Filing
015	1	Business Practice Requirements

Request Cross Reference			
Standard	Description	Request No.	Action
WEQ-001 NAESB Open Access Same-Time Information Systems (OASIS) Standards, Version 1.5			
001-0.30	Definition	WEQ 2008 Annual Plan Items 2.a.iv.3, 3.a.vii, and 6.1 (Part 1) (01/12/2009)	Add Definition "Unexercised Rollover Rights"
001-9.5.3	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.a.iv.3, 3.a.vii, and 6.1 (Part 1) (01/12/2009)	Modify Standard by adding language "Point-to-Point Transmission", "as specified in WEQ-001-9.7" and deleting the "s" in rights
001-13.1.5	Business Practice Requirements	Minor Correction (12/13/2008)	Add "Current" to select bullets within the standard
001-16	Business Practice Requirements	Minor Correction (12/13/2008)	Add "OR AFC" to standard
001-16.1	Business Practice Requirements	Minor Correction (12/13/2008)	Add "OR AFC" to standard title and modify standard language
001-20.1	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.a.iv.3, 3.a.vii, and 6.1 (Part 1) (01/12/2009)	Modify Standard by adding language "associated with that request" and correct spelling of "transstatus"
001-20.2	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.a.iv.3, 3.a.vii, and 6.1 (Part 1) (01/12/2009)	Modify Standard by removing all language and adding new
001-20.2.1	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.a.iv.3, 3.a.vii, and 6.1 (Part 1) (01/12/2009)	Add Standard for Rollover Rights
001-20.2.2	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.a.iv.3, 3.a.vii, and 6.1 (Part 1) (01/12/2009)	Add Standard for Rollover Rights
001-20.2.3	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.a.iv.3, 3.a.vii, and 6.1 (Part 1) (01/12/2009)	Add Standard for Rollover Rights
001-20.2.4	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.a.iv.3, 3.a.vii, and 6.1 (Part 1) (01/12/2009)	Add Standard for Rollover Rights
001-20.3	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.a.iv.3, 3.a.vii, and 6.1 (Part 1) (01/12/2009)	Add Standard for Rollover Rights
001-22	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.b.iii.1-3 (12/15/2008)	Add Standard for Posting the Capacity Benefit Margin
001-22.1	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.b.iii.1-3 (12/15/2008)	Add Standard for Posting the Capacity Benefit Margin
001-22.2	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.b.iii.1-3 (12/15/2008)	Add Standard for Posting the Capacity Benefit Margin

Request Cross Reference			
Standard	Description	Request No.	Action
WEQ-002 Open Access Same-Time Information System (OASIS) Standards & Communication Protocols, Version 1.5			
002-4.3.4.1	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.b.iii.1-3 (12/15/2008)	Modify Standard to include “TRANSACTION_TYPE”, “TPSE_CODE” and “SCHEDULE_PRIORITY”
002-5.10.1	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.b.iii.1-3 (12/15/2008)	Add new data elements “TRANSACTION_TYPE”, “TPSE_CODE”, and “SCHEDULE_PRIORITY” to <i>scheduledetail</i> (response) template
WEQ-003 NAESB Open Access Same-Time Information Systems (OASIS) Data Dictionary, Version 1.5			
003-0	Business Practice Requirements	Minor Correction (12/13/2008)	Correct inconsistency in the “SYSTEM_ATTRIBUTE” for value names “FGF” and “NFGF”
003-0	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.b.iii.1-3 (12/15/2008)	Modify Data Element “SCHEDULE_PRIORITY” and Add Data Elements “TRANSACTION_TYPE” and “TPSE_CODE”
003-0	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.a.iv.3, 3.a.vii, and 6.1 (Part 1) (01/12/2009)	Modify Definition of Data Element “REQUEST_TYPE” - RENEWAL
WEQ-004 NAESB WEQ Coordinate Interchange Standards			
004-18	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.b.iii.1-3 (12/15/2008)	Add Standard for Capacity Benefit Margin
004-18.1	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.b.iii.1-3 (12/15/2008)	Add Standard for Capacity Benefit Margin
004-18.2	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.b.iii.1-3 (12/15/2008)	Add Standard for Capacity Benefit Margin
004-D	Appendix	WEQ 2008 Annual Plan Item 6.m/R07007 (3/11/09)	Delete Commercial Timing Table and Replace with NEW Commercial Timing Tables (including timing requirements and examples of timing requirements)
WEQ-008 NAESB WEQ Transmission Loading Relief (Eastern Interconnection) Standards			
008-2.1.8	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.b.iii.1-3 (12/15/2008)	Modify Standard by adding “and Capacity Benefit Margin – (CB)”
008-3	Business Practice Requirements	WEQ 2008 Annual Plan Item 1.a.ii (01/12/2009)	Modify Standard by adding additional language for Eastern Interconnection Procedure for Physical Curtailment of Interchange Transactions
008-3.5.3	Business Practice Requirements	WEQ 2008 Annual Plan Item 1.a.ii (01/12/2009)	Add Standard for Eastern Interconnection Procedure for Physical Curtailment of Interchange Transactions
008-3.6.2	Business Practice Requirements	WEQ 2008 Annual Plan Item 1.a.ii (01/12/2009)	Modify Standard to include “sequential, three-step”

Request Cross Reference			
Standard	Description	Request No.	Action
008-3.6.2.1	Business Practice Requirements	WEQ 2008 Annual Plan Item 1.a.ii (01/12/2009)	Modify Standard to identify "Step 1" and add additional language
008-3.6.2.2	Business Practice Requirements	WEQ 2008 Annual Plan Item 1.a.ii (01/12/2009)	Modify Standard to identify "Step 2" and delete "and"
008-3.6.2.3	Business Practice Requirements	WEQ 2008 Annual Plan Item 1.a.ii (01/12/2009)	Modify Standard to identify "Step 3" and strike "to" and add "with"
008-3.7	Business Practice Requirements	WEQ 2008 Annual Plan Item 1.a.ii (01/12/2009)	Modify Standard by adding language to "TLR LEVEL 5b"
008.3.7.1	Business Practice Requirements	WEQ 2008 Annual Plan Item 1.a.ii (01/12/2009)	Modify Standard to add "sequential, three-step"
008-3.7.1.1	Business Practice Requirements	WEQ 2008 Annual Plan Item 1.a.ii (01/12/2009)	Modify Standard to identify "Step 1"
008-3.7.1.1.1	Business Practice Requirements	WEQ 2008 Annual Plan Item 1.a.ii (01/12/2009)	Modify Standard by adding "proceeding to Steps 2 and 3"
008-3.7.1.2	Business Practice Requirements	WEQ 2008 Annual Plan Item 1.a.ii (01/12/2009)	Modify Standard to identify "Step 2" and strike "and"
008-3.7.1.3	Business Practice Requirements	WEQ 2008 Annual Plan Item 1.a.ii (01/12/2009)	Modify Standard to identify "Step 3"
008-C	Business Practice Requirements	WEQ 2008 Annual Plan Item 1.a.ii (01/12/2009)	Modify Appendix by replacing the table and figure "Allocation Based on Weighted Impact"
WEQ-013 Open Access Same-Time Information Systems (OASIS) Implementation Guide, Version 1.5			
013-2.1	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.a.iv.3, 3.a.vii, and 6.1 (Part 1) (01/12/2009)	Modify Standard Transaction Request Type "RENEWAL"
013-2.6.2	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.a.iv.3, 3.a.vii, and 6.1 (Part 1) (01/12/2009)	Modify Standard "RENEWAL Requests"
013-2.6.8.2	Business Practice Requirements	Minor Correction (03/10/09)	Remove "FULL_TRANSER" and replace with "PART_TRANSFER"
013-3.2	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.b.iii.1-3 (12/15/2008)	Add Data Elements "TRANSACTION_TYPE", "TPSE_CODE", and modify "SCHEDULE_PRIORITY"
013-4.1.2	Business Practice Requirements	WEQ 2008 Annual Plan Items 2.b.iii.1-3 (12/15/2008)	Modify Response Data

Version Cross Reference:

The Version Cross Reference lists each NAESB standard number followed by four columns. The column entitled "Adopted" identifies for which version the standard was adopted. The column entitled "Revised" identifies versions where the standard was revised. The column entitled "Interpreted Version" identifies versions where the standard was interpreted. The last column "Interpretation Number" identifies the interpretation number for the version specified in the previous column. The language of the standards themselves can be accessed from the

NAESB home page (www.naesb.org). With the Version Cross Reference, a determination can be made of all standards that were created, changed or interpreted for a given version.

For standards that were created in Version 002.1, the "Adopted" column will contain the value "002.1." For standards that were modified in Version 002.1, the "Revised" column will contain the value "002.1." A standard may have multiple revisions specified. For standards that were interpreted in Version 002.1, the "Interpreted Version" column will contain the value "002.1" and the "Interpretation Number" column will contain the related interpretation number. There were no interpretations processed for Versions 001 or for Version 002.1. A standard may have multiple interpretations specified.

The versions noted in the version cross reference are:

Version 000 January 15, 2005

Version 000 NAESB WEQ Standards were published on January 15, 2005. Those standards that were federally jurisdictional were submitted to the Federal Energy Regulatory Commission on January 18, 2005. The Version 000 standards were the subject of a FERC Rulemaking, Order No. 676, Docket No. RM05-5-000, issued on April 25, 2006, and Order No. 676-B, Docket No. RM05-5-003, issued on April 19, 2007.

Version 001 October 31, 2007

Version 001 NAESB WEQ Standards were published on October 31, 2007. Those standards that were federally jurisdictional were submitted to the Federal Energy Regulatory Commission on December 21, 2007. The Version 001 standards were the subject of a FERC Rulemaking, Order No. 676-C, Docket No. RM05-5-005, issued on July 21, 2008.

Version 002 September 30, 2008

Version 002 NAESB WEQ Standards were published on September 30, 2008. Those standards that are federally jurisdictional were submitted to the Federal Energy Regulatory Commission on August 29, 2008.

Version 002.1 March 11, 2009

Version 002.1 NAESB WEQ Standards will be published on March 11, 2009 after the completion of outstanding ratification processes. Those standards that are federally jurisdictional were submitted to the Federal Energy Regulatory Commission on February 19, 2009.

Version Cross Reference				
Standard	Adopted	Revised	Interpreted Version	Interpretation Number () – indicates reference
WEQ-001 NAESB Open Access Same-Time Information Systems (OASIS) Standards, Version 1.5				
001-0.30	002.1			
001-9.5.3	000	002.1		
001-13.1.5	002.0	002.1		
001-16	002.0	002.1		
001-16.1	002.0	002.1		
001-20.1	002.0	002.1		
001-20.2	002.0	002.1		
001-20.2.1	002.1			

Version Cross Reference				
Standard	Adopted	Revised	Interpreted Version	Interpretation Number () – indicates reference
001-20.2.2	002.1			
001-20.2.3	002.1			
001-20.2.4	002.1			
001-20.3	002.1			
001-22	002.1			
001-22.1	002.1			
001-22.2	002.1			
WEQ-002 Open Access Same-Time Information System (OASIS) Standards & Communication Protocols, Version 1.5				
002-4.3.4.1	000	001 002.0 002.1		
002-5.10.1	002.0	002.1		
WEQ-003 NAESB Open Access Same-Time Information Systems (OASIS) Data Dictionary, Version 1.5				
003-0	000	001 002.0 002.1		
WEQ-004 NAESB WEQ Coordinate Interchange Standards				
004-18	002.1			
004-18.1	002.1			
004-18.2	002.1			
004-D	000	001 002.0 002.1		
WEQ-008 NAESB WEQ Transmission Loading Relief (Eastern Interconnection) Standards				
008-2.1.8	002.0	002.1		
008-3	001	002.1		
008-3.5.3	002.1			
008-3.6.2	001	002.1		
008-3.6.2.1	001	002.1		
008-3.6.2.2	001	002.1		

Version Cross Reference				
Standard	Adopted	Revised	Interpreted Version	Interpretation Number () – indicates reference
008-3.6.2.3	001	002.1		
008-3.7	001	002.1		
008.3.7.1	001	002.1		
008-3.7.1.1	001	002.1		
008-3.7.1.1.1	001	002.1		
008-3.7.1.2	001	002.1		
008-3.7.1.3	001	002.1		
008-C	001	002.0 002.1		
WEQ-013 Open Access Same-Time Information Systems (OASIS) Implementation Guide, Version 1.5				
013-2.1	001	002.0 002.1		
013-2.6.2	001	002.0 002.1		
013-2.6.8.2	002.0	002.1		
013-3.2	001	002.0 002.1		
013-4.1.2	001	002.0 002.1		

Appendix A – Links to Executive Committee Meeting Minutes, Comments and Voting Record Links			
Date of Meeting	Link to Minutes and Executive Committee Voting Records	Recommendations that Resulted in V002.1 Standards or Standard modifications	Link to Comments Submitted During Formal Comment Period
10-23-08	http://www.naesb.org/pdf4/weq_ec102308fm.doc	<p>CBM:</p> <p>Recommendation 2008 WEQ Annual Plan Item 2(b)(iii)(1-3) (Redline) - http://www.naesb.org/pdf4/weq_ec102308a1.doc</p> <p>Recommendation 2008 WEQ Annual Plan Item 2(b)(iii)(1-3) (Clean) – http://www.naesb.org/pdf4/weq_ec102308a2.doc</p>	<p>NAESB Standards Review Subcommittee: http://www.naesb.org/pdf3/weq_080508srs.doc</p> <p>PJM: http://www.naesb.org/pdf3/weq_080508pjm.doc</p>
11-4-08	http://www.naesb.org/pdf4/weq_ec110408fm.doc	<p>Rollover Rights:</p> <p>Recommendation 2008 WEQ Annual Plan Item 2(a)(iv)(3), 3(a)(vii) and 6(l) (Redline) - http://www.naesb.org/pdf4/weq_ec110408a13.doc</p> <p>Recommendation 2008 WEQ Annual Plan Item 2(a)(iv)(3), 3(a)(vii) and 6(l) (Clean) - http://www.naesb.org/pdf4/weq_ec110408a14.doc</p>	<p>PJM, Southwest Power Pool and Midwest ISO: http://www.naesb.org/pdf3/weq_090508spp_pjm_miso.doc</p> <p>Puget Sound Energy: http://www.naesb.org/pdf3/weq_090508puget.doc</p> <p>NAESB Standards Review Subcommittee: http://www.naesb.org/pdf3/weq_090508srs.doc</p> <p>Southern Company: http://www.naesb.org/pdf3/weq_090508southern.doc</p> <p>Electric Power Supply Association: http://www.naesb.org/pdf3/weq_090508epsa.doc</p> <p>Entergy Services: http://www.naesb.org/pdf3/weq_090508entergy.doc</p> <p>Bonneville Power Administration: http://www.naesb.org/pdf3/weq_090508bpa.doc</p>
11-4-08	http://www.naesb.org/pdf4/weq_ec110408fm.doc	<p>TLR:</p> <p>Recommendation 2008 Annual Plan Item 1a(ii) (Redline) - http://www.naesb.org/pdf4/weq_ec110408a11.doc</p> <p>Recommendation 2008 Annual Plan Item 1a(ii) (Clean) - http://www.naesb.org/pdf4/weq_ec110408a12.doc</p>	<p>NAESB Standards Review Subcommittee: http://www.naesb.org/pdf4/weq_092308_1aii_srs.doc</p> <p>Tennessee Valley Authority: http://www.naesb.org/pdf4/weq_092308_1aii_tva.doc</p> <p>Entergy Services: http://www.naesb.org/pdf4/weq_092308_1aii_entergy.doc</p> <p>Southern Company: http://www.naesb.org/pdf4/weq_092308_1aii_southern.doc</p>

Appendix A – Links to Executive Committee Meeting Minutes, Comments and Voting Record Links			
Date of Meeting	Link to Minutes and Executive Committee Voting Records	Recommendations that Resulted in V002.1 Standards or Standard modifications	Link to Comments Submitted During Formal Comment Period
2-3-09	http://www.naesb.org/pdf4/weq_ec020309dm.doc	Timing Table: Recommendation WEQ 2008 Annual Plan Item 6.m (R07007) (Redline) - http://www.naesb.org/pdf4/weq_ec020309a2.doc Recommendation WEQ 2008 Annual Plan Item 6.m (R07007) (Clean) - http://www.naesb.org/pdf4/weq_ec020309a3.doc	NAESB Standards Review Subcommittee: http://www.naesb.org/pdf4/weq_101008_6m_srs.doc

Appendix B – Links to Ratification Ballots and Ratification Results

Date of Ballot	Link to Ballot	Link to Ratification Results	Recommendations Ratified that Resulted in V002.1 Standards or Standard modifications
11-14-08	http://www.naesb.org/member_login_form.asp?doc=weq_rat111408ballot.doc	http://www.naesb.org/member_login_form.asp?doc=rat_weq121508tally.xls	<p>Recommendation 2008 WEQ Annual Plan Item 2(b)(iii)(1-3) http://www.naesb.org/member_login_form.asp?doc=weq_rat111408_2008_weq_api_2biii_1_3_rec_redline.doc (Redline) http://www.naesb.org/member_login_form.asp?doc=weq_rat111408_2008_weq_api_2biii_1_3_rec_clean.doc (Clean)</p> <p>Final Action: http://www.naesb.org/member_login_form.asp?doc=fa_2008_weq_api_2biii_1_3.doc</p>
12-11-08	http://www.naesb.org/member_login_form.asp?doc=weq_rat121108ballot.doc	http://www.naesb.org/member_login_form.asp?doc=rat_weq011209tally.xls	<p>Recommendation 2008 WEQ Annual Plan Items 2(a)(iv)(3), 3(a)(vii), and 6(l) http://www.naesb.org/member_login_form.asp?doc=weq_rat121108_weq_2008_api_2aiv3_3avii_6l_rec_redline.doc (Redline) http://www.naesb.org/member_login_form.asp?doc=weq_rat121108_weq_2008_api_2aiv3_3avii_6l_rec_clean.doc (Clean)</p> <p>Final Action: http://www.naesb.org/member_login_form.asp?doc=fa_weq_2008_api_2aiv3_3avii_6l.doc</p>
12-11-08	http://www.naesb.org/member_login_form.asp?doc=weq_rat121108ballot.doc	http://www.naesb.org/member_login_form.asp?doc=rat_weq011209tally.xls	<p>Recommendation 2008 WEQ Annual Plan Item 1a(ii) http://www.naesb.org/member_login_form.asp?doc=weq_rat121108_weq_2008_api_1aii_rec_redline.doc (Redline) http://www.naesb.org/member_login_form.asp?doc=weq_rat121108_weq_2008_api_1aii_rec_clean.doc (Clean)</p> <p>Final Action: http://www.naesb.org/member_login_form.asp?doc=fa_weq_2008_api_1aii.doc</p>
2-9-09	http://www.naesb.org/member_login_form.asp?doc=weq_rat020909ballot.doc	Ratification period ends March 11, 2009	<p>Recommendation 2008 WEQ Annual Plan Item 6.m/R07007 http://www.naesb.org/member_login_form.asp?doc=weq_rat020909_weq_2008_api_6m_r07007_rec_redline.doc (Redline) http://www.naesb.org/member_login_form.asp?doc=weq_rat020909_weq_2008_api_6m_r07007_rec_clean.doc (Clean)</p> <p>Final Action: To be posted at the conclusion of the ratification period on March 11, 2009</p>

Appendix C –List of Available Transcripts

Date of Meeting	Meeting and Minutes	Transcription Service	How to obtain transcripts ¹
10-23-08	WEQ EC Meeting http://www.naesb.org/pdf4/weq_ec102308fm.doc	Jill Webb	Jill Webb, CSR 1803 Rustic Oak Ln Seabrook, Texas 77586 281-853-6807
11-4-08	WEQ EC Meeting http://www.naesb.org/pdf4/weq_ec110408fm.doc	Preferred Legal	Call Preferred Legal 800-405-4056
2-3-09	WEQ EC Meeting http://www.naesb.org/pdf4/weq_ec020309dm.doc	Preferred Legal	Call Preferred Legal 800-405-4056

¹ The Federal Energy Regulatory Commission and other regulatory agencies may contact the NAESB office to obtain electronic copies of the transcripts. All others can contact the transcription service and order the transcripts for a nominal fee.

Appendix D Recommendation, Comments, and WEQ Executive Committee Voting Record Regarding the Available Transfer Capability Information List

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Appendix D – Recommendation, Comments and WEQ EC Committee Voting Record on ATC Information List		
Date	Description	Documents
8-18-08	ATC Information List Recommendation issued for Industry Comment	Recommendation 2008 WEQ Annual Plan Item 2.c (Redline): http://www.naesb.org/pdf3/weq_2008_api_2c_rec_redline.doc Recommendation 2008 WEQ Annual Plan Item 2.c (Clean): http://www.naesb.org/pdf3/weq_2008_api_2c_rec_clean.doc
9-17-08	Comments Received from Industry Comment Period	Entergy (Motion 1): http://www.naesb.org/pdf3/weq_091708entergy_M1.doc Entergy (Motion 1- Redline): http://www.naesb.org/pdf3/weq_091708entergy_M1_Redline.doc Entergy (Motion 2): http://www.naesb.org/pdf3/weq_091708entergy_M2.doc Entergy (Motion 2 - Redline): http://www.naesb.org/pdf3/weq_091708entergy_M2_Redline.doc NERC Staff: http://www.naesb.org/pdf3/weq_091708nerc.doc Co-Chairs of the NAESB WEQ BPS, ESS/ITS Subcommittees: http://www.naesb.org/pdf3/weq_091708cochairs_bps_ess_its.doc NAESB Standards Review Subcommittee: http://www.naesb.org/pdf3/weq_091708srs.doc Duke Energy and Salt River Project: http://www.naesb.org/pdf3/weq_091708duke_srp.doc Electric Power Supply Association: http://www.naesb.org/pdf3/weq_091708epsa.doc NRG Energy: http://www.naesb.org/pdf3/weq_091708nrg.pdf Constellation Energy Resources: http://www.naesb.org/pdf3/weq_091708constellation.pdf MidAmerican Energy Company: http://www.naesb.org/pdf3/weq_091708midamerican.doc Arizona Public Service Company: http://www.naesb.org/pdf3/weq_091708aps.doc Southern Company Transmission: http://www.naesb.org/pdf3/weq_091708southern.doc
10-6-08	WEQ EC Meeting Minutes and Voting Record	WEQ EC Meeting: http://www.naesb.org/pdf4/weq_ec100608fm.doc WEQ EC Notational Ballot Results: http://www.naesb.org/pdf4/weq_ec100608ballot_results.doc
10-6-08	Meeting Documents	Recommendation 2008 WEQ Annual Plan Item 2.c – Motion 1 - (Redline): http://www.naesb.org/pdf3/weq_ec100608a1.doc Recommendation 2008 WEQ Annual Plan Item 2.c – Motion 2: http://www.naesb.org/pdf3/weq_ec100608a3.doc WEQ EC Meeting Motions: http://www.naesb.org/pdf3/weq_ec100608a2.doc
10-6-08	Availability of Transcript	Preferred Legal 800-405-4056

The NAESB Standards Development Process

NAESB is focused on proposing, considering, and adopting voluntary standards and model business practices that will have a significant and lasting impact on all aspects of the natural gas and electricity marketplaces. As a result of the standards NAESB adopts, it is expected that the industry will operate more efficiently and effectively, benefiting both the industry and its customers. At the same time, it must be acknowledged that NAESB standards may constitute a change in the way parties do business, with an accompanying effect on the use and allocation of resources.

NAESB's policy is to move at a deliberate pace, consistent with its annual plan(s), thus permitting those affected by its standards, especially those standards adopted as regulations by the Federal Energy Regulatory Commission (FERC) or other regulatory bodies, to assimilate them as part of their business practices. To this end, NAESB will carefully consider whether proposed standards are both timely and necessary. In particular, it will try to avoid adopting and implementing new standards, however beneficial, before the industry is able to reasonably make use of them.

The standards development process is governed by the annual plan, and items can be included in the plan or modified only with Board approval. The plan typically reflects requests from NAESB members, government agencies, and other interested parties. In approving the annual plan, the Board considers the availability of resources, including the NAESB budget and staff and the availability of industry volunteers. New requests received throughout the year are either considered part of the existing annual plan or as new items that require Board approval.

The standards development process begins with an annual plan item or a triaged and approved request. Triage is a process used by each quadrant of the Executive Committee (EC) to determine whether a request is within scope, which quadrant(s) it applies to, which subcommittee(s) it should be referred to, and what priority it should be assigned. Triage is carried out by EC members appointed by the EC chair. Triage recommendations are submitted to the en banc EC and require EC approval, and may also require Board approval if there are scope questions or if a modification of the annual plan is required.

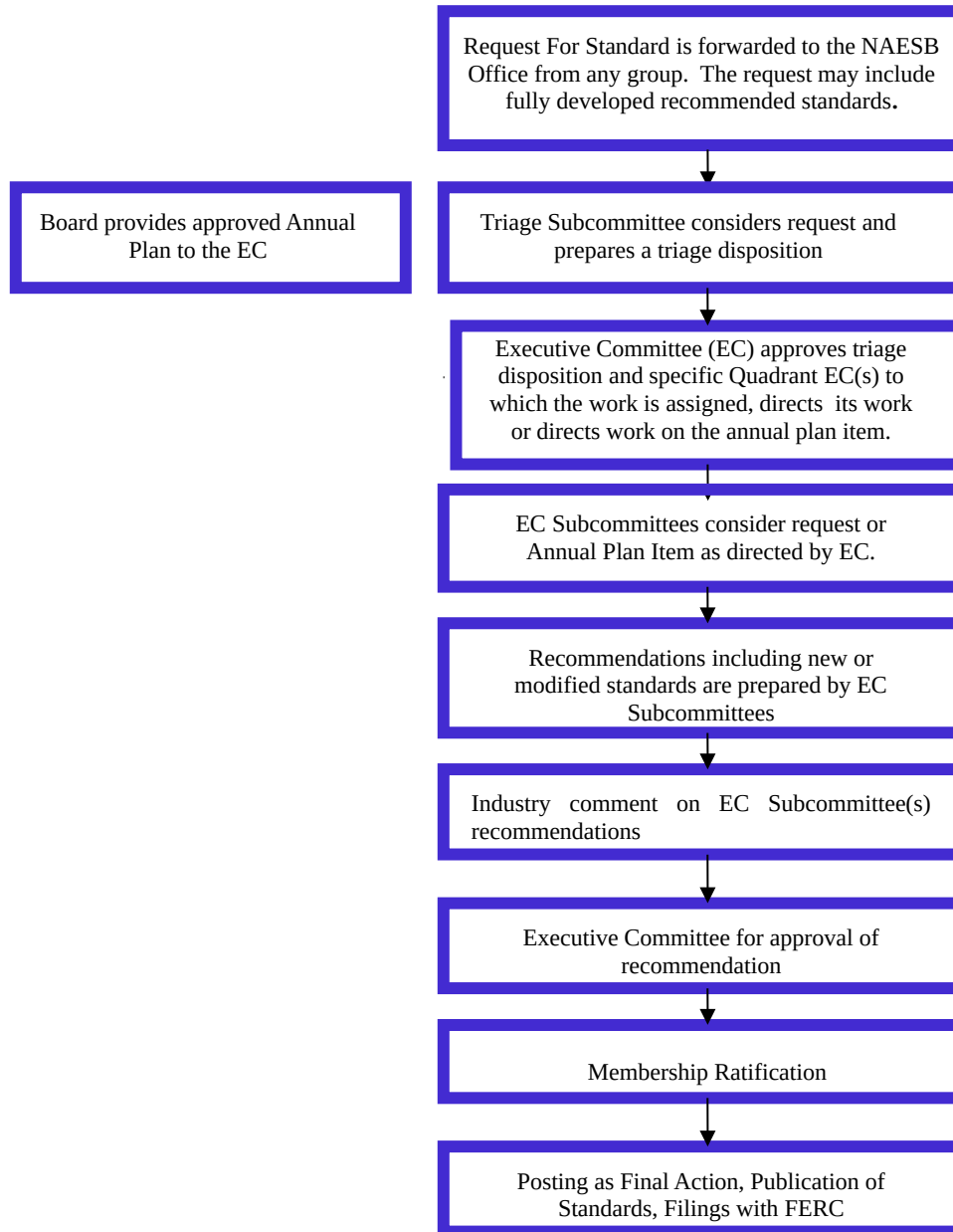
Once the triage process is completed, the subcommittees—more than one are normally involved in standards recommendations—review the request, compare it to existing standards, and prepare recommendations that may take the form of new or modified standards or interpretations. Participation in EC subcommittees is open to any interested party regardless of membership status. All subcommittee participants may vote; voting is balanced by segment and quadrant. All votes are public.

When the recommendation is complete, it is made available for a thirty-day industry comment period. The recommendation and comments are then forwarded to the EC, which considers the recommendation, makes any changes it deems necessary, and takes a vote. A recommendation must receive an affirmative vote of at least 67 percent from each applicable quadrant EC and 40 percent from each of the segments of the applicable quadrant(s).

After passage by the EC, the recommendation must be ratified by the NAESB members. An affirmative vote of 67 percent of the members of the applicable quadrant(s) is required for ratification. After ratification, standards and modifications are considered final actions and will be published in the next version of NAESB standards.

All NAESB quadrants follow the same development process described herein. The process has been followed by the WGQ since 1994 and has been used to develop more than five hundred standards that have been incorporated by reference into federal regulations.

North American Energy Standards Board
Standards Development Process Flow Chart



Flexibility

NAESB recognizes that flexibility is necessary as standards are developed to address regional concerns or to incorporate variances to accommodate operational or structural differences. Several WEQ standards incorporate regional or operational differences for both Version 0 and Version 1. There is a high threshold for incorporating such variances in a standard; the subcommittee(s) in drafting the standard, the EC in approving the subcommittee recommendation, and the membership in approving the standard must all agree that such variance is necessary. Nonetheless, NAESB procedures are well suited to take into account operational and regional differences.

Transparency

All NAESB meetings are open for attendance and participation by any interested party, with the exception of executive sessions of the Board or Managing Committee for purposes of discussing personnel, compensation or legal issues. Meeting announcements and agendas are posted in advance to permit the widest possible participation. Conference-calling capability is available for all meetings and web casting is available for most. Those intending to attend a meeting in person or by telephone are asked to notify NAESB by a specific date to permit adequate meeting planning.

Transcripts are made of all Board of Directors and EC meetings, and may also be made of other meetings that are expected to be controversial. Transcripts are maintained in the NAESB office and are provided to regulatory agencies for their internal use. All other interested parties can purchase transcripts from the relevant transcription service.

Coordination with NERC

For business practice standards development for the WEQ, if it is determined by NERC and NAESB Executive Management that joint development is needed by NERC and NAESB, the NERC-NAESB Coordination Joint Development Process is implemented.¹ This process requires that the appropriate NAESB Subcommittee and NERC Standards drafting team work together to develop reliability standards and business practices. This process is currently being implemented by the NAESB WEQ BPS and ESS/ITS with the NERC ATC Standards drafting team to develop reliability standards and business practice standards to address Commission Order No. 890.

The Joint Interface Committee of NAESB, NERC and the ISO-RTO Council (“JIC”) was dissolved as part of the agreement to create the Independent Grid Operator segment of the WEQ. The joint development process between NAESB and NERC is being used to ensure appropriate coordination. The ISOs and RTOs have strong decision-making roles in both NERC and NAESB, and thus with the use of the joint development process, the JIC was no longer necessary.

¹ The NERC-NAESB Coordination Joint Development Process was submitted to the Commission on February 17, 2006 in Attachment C of the Progress Report on NAESB Activities impacting Docket No. RM05-5-000, “Standards for Business Practices and Communication Protocols for Public Utilities”: http://www.naesb.org/doc_view2.asp?doc=ferc021706.pdf.

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Name ²	Cite	Order 890 Work Plan			
		Action Item/Work Plan	Action Item Home	Target Dates	Status
ATC GROUP ASSIGNMENTS (ESS/ITS and BPS)					
□	243, 244, 246	<p>Business Practice Standards complementary to NERC Reliability Standards for Existing Transmission Commitment (ETC) to create a “consistent approach for determining the amount of transfer capability a transmission provider may set aside for its native load and other committed uses”, including the elements of ETC for full implementation of the NERC MOD-001 reliability standard*</p> <p>Paragraphs 243, 244, and 246 will require coordination with the NERC Order 890 reliability standards development</p> <p>*Posting requirements for ETC assigned to ESS/ITS (see 2008 AP 2(a)(vi)(4) and Order 890 WP, Group 6)</p> <p>Order 890-A:</p> <p>63. The Commission also found that inclusion of all requests for transmission service in ETC would likely overstate usage of the system and understate ATC. The Commission therefore found that reservations that have the same point of receipt (POR) (generator) but different point of delivery (POD) (load), for the same time frame, should not be modeled in the ETC calculation simultaneously if their combined reserved transmission capacity exceeds the generator’s nameplate capacity at the POR. The Commission directed public utilities, working through NERC, to develop requirements in MOD-001 that lay out clear instructions on how these reservations should be modeled. The Commission also concluded that some elements of ETC are candidates for business practices instead of reliability standards and directed public utilities, working through NAESB, to develop business practices necessary for full implementation of the MOD-001 reliability standard.</p> <p>151. We decline to impose additional posting requirements regarding ETC uses, as requested by EPSA and Powerex. In Order No. 890, the Commission required transmission providers to make available all data used to calculate ATC for constrained paths and any system planning studies or specific network impact studies performed for customers. This would include information regarding ETC uses, including grandfathered agreements, that affect ATC calculations or study results. EPSA and Powerex fail to demonstrate that it is necessary to require the posting of additional information regarding ETC uses to verify the accuracy of the transmission provider’s ATC calculations. We note in response to Powerex that, if any new service taken upon</p>	WEQ 2008 Annual Plan Item 2(b)(ii)(1)	<p>These dates are dependent on NERC deliverables and may be changed if NERC timelines for Order 890 are changed:</p> <p>FORMAL COMMENT: 2nd Quarter, 2008</p> <p>WEQ EC VOTE: 3rd Quarter, 2008</p> <p>RATIFICATION: 3rd Quarter, 2008</p>	<p>The NAESB ESS/ITS and BPS are working to draft complementary business practices to the NERC MOD028, MOD029, and MOD030, which includes ETC. The NERC team has determined that there is not a need for explicit posting of ETC values; the ESS/ITS and BPS supports the decision. ESS/ITS/BPS will look at the NERC MODs to determine if additional business practices are needed for ETC components.</p> <p>Recommendation was voted out of subcommittee on June 17, 2008.</p> <p>Formal comment period closed on July 21, 2008.</p> <p>Approved by WEQ EC August 19, 2008.</p> <p>Ratified by the membership on 9/22/2008.</p>

² Status is defined as: □ - Complete, C – formal commenting period, I – in progress of standards development underway in subcommittee, NS – development not started.

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Stanc	Cite	Order 890 Work Plan			
		Action Item/Work Plan	Action Item Home	Target Dates	Status
		expiration of a pre-Order No. 888 contract, the terms and conditions of the transmission provider's OATT would apply.			
□	293	<ul style="list-style-type: none"> Business practice standards for accounting for counterflows. These standards will be included in the ATC business practice standards (Paragraph 293 will require coordination with the NERC Order 890 reliability standards development) 	WEQ 2008 Annual Plan Item 2(b)(ii)(2)	<p>These dates are dependent on NERC deliverables and may be changed if NERC timelines for Order 890 are changed:</p> <p>FORMAL COMMENT: 2nd Quarter, 2008</p> <p>WEQ EC VOTE: 3rd Quarter, 2008</p> <p>RATIFICATION: 3rd Quarter 2008</p>	<p>The ESS/ITS and BPS have created a list of items that are considered post-backs to be used in the creation of post back requirements. NERC has requested that NAESB practices address post-back requirements. (8/16/07)</p> <p>On March 11-12, 2008, the ESS/ITS and BPS passed motions to define high level concepts for counterflows and post backs. Draft standards are being developed by sub-teams.</p> <p>Subcommittee voted recommendation for counterflows and Postbacks out of subcommittee on May 15, 2008.</p> <p>Formal comment period closed on June 23, 2008.</p> <p>Approved by WEQ EC August 19, 2008.</p> <p>Ratified by the membership on 9/22/2008.</p>
□	257	<p>Capacity Benefit Margin (CBM) Business Practices</p> <ul style="list-style-type: none"> Business practice standards to set forth “how the CBM value shall be determined, allocated across transmission paths, and used” and how transmission providers will “reflect the set-aside of transfer capability as CBM in the development of the rate for point-to-point transmission service.” (Paragraph 257 will require coordination 	WEQ 2008 Annual Plan Item 2(b)(iii)(1)	<p>These dates are dependent on NERC deliverables and may be changed if NERC timelines for Order 890 are changed:</p> <p>FORMAL COMMENT: 3rd</p>	<p>The ESS/ITS and BPS have begun identifying complementary business practices to NERC MOD004.</p> <p>The ESS/ITS and BPS have</p>

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Status	Cite	Order 890 Work Plan			
		Action Item/Work Plan	Action Item Home	Target Dates	Status
		<p>with the NERC Order 890 reliability standards development)</p> <p>Order 890-A:</p> <p>68. The Commission directed public utilities, working through NERC and NAESB, to develop clear standards and business practices for how the CBM value is determined, allocated across transmission paths and flowgates, and used. To ensure that CBM is used for its intended purpose, the Commission provided that CBM shall only be used to allow an LSE to meet its generation reliability criteria. The Commission rejected requests to allow CBM to be used to meet reserve-sharing needs, explaining that TRM is the appropriate category for that purpose. Public utilities were directed to work with NAESB to develop an OASIS mechanism that will allow for auditing of CBM usage.</p> <p>83. The Commission did not mandate a particular methodology for allocating CBM over transmission paths and flowgates in Order No. 890. We therefore reject Southern's argument that development of a consistent methodology for calculating CBM would be harmful to LSEs because reserve needs vary from area to area. While we expect the NERC and NAESB process to produce a consistent and transparent process for setting aside and allocating CBM based on LSE requests, we decline to prescribe a specific method for how CBM should be obtained or allocated or otherwise determine the amount of capacity that the transmission provider has to set aside in response to requests from multiple LSEs.</p>		<p>Quarter, 2008</p> <p>WEQ EC VOTE: 4th Quarter, 2008</p> <p>RATIFICATION: 4th Quarter, 2008</p>	<p>identified the NAESB business practice standards that may be needed to address CBM, including where the CBM value shall be posted; how to allocate priority use of CBM; how to allocate the amount of CBM; the ability to audit CBM usage; a new request type on OASIS to distinguish a CBM reservation; and for the posting of CBM on the OASIS system data template.</p> <p>The joint subcommittee has determined no additional standards need to be developed for this work plan item.</p> <p>Recommendation voted out of subcommittee on July 30th.</p> <p>Formal Comment period closes September 5, 2008.</p> <p>Approved by WEQ EC November 7, 2008.</p> <p>Ratified by the membership on December 15, 2008.</p>
□	262	<ul style="list-style-type: none"> Business practice standards that include an OASIS mechanism to "allow for auditing of CBM usage." (Paragraph 262 does not require coordination with the NERC Order 890 reliability standards development) <p>Order 890-A:</p> <p>68. The Commission directed public utilities, working through NERC and NAESB, to develop clear standards and business practices for how the CBM value is determined, allocated across transmission paths and flowgates, and used. To ensure that CBM is</p>	WEQ 2008 Annual Plan Item 2(b)(iii)(2)	<p>FORMAL COMMENT: 3rd Quarter, 2008</p> <p>WEQ EC VOTE: 4th Quarter, 2008</p> <p>RATIFICATION: 4th Quarter, 2008</p>	<p>The ESS/ITS and BPS are continuing to evaluate and review the templates and practices for CBM, including auditing of CBM usage. 8/16/07</p> <p>If we are using existing templates and the existing</p>

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Status	Cite	Order 890 Work Plan			
		Action Item/Work Plan	Action Item Home	Target Dates	Status
		used for its intended purpose, the Commission provided that CBM shall only be used to allow an LSE to meet its generation reliability criteria. The Commission rejected requests to allow CBM to be used to meet reserve-sharing needs, explaining that TRM is the appropriate category for that purpose. Public utilities were directed to work with NAESB to develop an OASIS mechanism that will allow for auditing of CBM usage.			<p>templates have corresponding “Audit Templates”, additional work may not be needed.</p> <p>The joint subcommittee is working with JISWG on this annual plan item. Changes are expected to be required for WEQ 001, 002, 003, 004, and 013.</p> <p>Recommendation voted out of subcommittee on July 30th.</p> <p>Formal Comment period closes September 5, 2008.</p> <p>Approved by WEQ EC November 7, 2008.</p> <p>Ratified by the membership on December 15, 2008.</p>
□		<ul style="list-style-type: none"> Any additional business practice standards needed to complement the NERC CBM reliability standards (MOD004) created as a result of this effort. (This item is a catchall section in case there are areas where business practices are needed as a result of the NERC CBM reliability standards. This item will require coordination with the NERC Order 890 reliability standards development). 	WEQ 2008 Annual Plan Item 2(b)(iii)(3)	<p>These dates are dependent on NERC deliverables and may be changed if NERC timelines for Order 890 are changed:</p> <p>FORMAL COMMENT: 3rd Quarter, 2008</p> <p>WEQ EC VOTE: 4th Quarter, 2008</p> <p>RATIFICATION: 4th Quarter,, 2008</p>	<p>The ESS/ITS and BPS have begun identifying complementary business practices to NERC MOD004.</p> <p>The joint subcommittee has determined no additional standards need to be developed for this work plan item.</p> <p>Recommendation voted out of subcommittee on July 30th.</p> <p>Formal Comment period closes September 5, 2008.</p> <p>Approved by WEQ EC November 7, 2008.</p>

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Status	Cite	Order 890 Work Plan			
		Action Item/Work Plan	Action Item Home	Target Dates	Status
					Ratified by the membership on December 15, 2008.
□	272	<ul style="list-style-type: none"> Transmission Reliability Margin (TRM): Business Practice Standards to complement the NERC reliability standards for TRM (Paragraph 272 will require coordination with the NERC Order 890 reliability standards development) 	WEQ 2008 Annual Plan Item 2(b)(iv) (1)	<p>These dates are dependent on NERC deliverables and may be changed if NERC timelines for Order 890 are changed:</p> <p>FORMAL COMMENT: 2nd Quarter, 2008</p> <p>WEQ EC VOTE: 2nd Quarter, 2008</p> <p>RATIFICATION: N/A</p>	<p>The ESS/ITS and BPS have begun identifying complementary business practices to NERC MOD008.</p> <p>The ESS/ITS and BPS are continuing to evaluate and review the templates and practices for TRM, 8/16/07</p> <p>The ESS/ITS and BPS determined no additional standards needed to be developed for this item and voted for the co-chairs to develop recommendation and post formal comments 3/31/08.</p> <p>Recommendation posted for 30-day formal comment period on April 8th.</p> <p>The recommendation was voted out of the EC on May 13.</p>
□	273	<ul style="list-style-type: none"> The TRM business practice standards will include specification of the appropriate uses of TRM and when transmission providers may set aside TRM (Paragraph 273 will require coordination with the NERC Order 890 reliability standards development) <p>Order 890-A:</p> <p>94. The Commission clarifies that NERC was not directed to identify an actual number or a particular methodology to include in the TRM standards, MOD-008-0 and MOD-009-0. The Commission's intent was to require NERC and NAESB to include consistent criteria and guidelines in the calculation and uses of TRM by transmission providers. Likewise, in response to Southern's concern regarding flexibility to use</p>	WEQ 2008 Annual Plan Item 2(b)(iv)(2)	<p>These dates are dependent on NERC deliverables and may be changed if NERC timelines for Order 890 are changed:</p> <p>FORMAL COMMENT: 2nd Quarter, 2008</p> <p>WEQ EC VOTE: 2nd Quarter, 2008</p> <p>RATIFICATION: N/A</p>	<p>The ESS/ITS and BPS have begun identifying complementary business practices to NERC MOD008.</p> <p>The ESS/ITS and BPS are continuing to evaluate and review the templates and practices for TRM, 8/16/07</p> <p>The ESS/ITS and BPS determined no additional</p>

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		something other than the ratings reduction method discussed in Order No. 890, we clarify that the ratings reduction method is only an example of a simple method that could be used. Our intent is not to prohibit a transmission provider from using a more sophisticated method, so long as it is consistent with the reliability standards developed by NERC.			standards needed to be developed for this item and voted for the co-chairs to develop recommendation and post formal comments 3/31/08. Recommendation posted for 30-day formal comment period on April 8 th . The recommendation was voted out of the EC on May 13.
□		<ul style="list-style-type: none"> Any additional business practice standards needed to complement the NERC TRM reliability standards (MOD008) created as a result of this effort (This item is a catchall section in case there are areas where business practices are needed as a result of the NERC TRM reliability standards. This item will require coordination with the NERC Order 890 reliability standards development). 	WEQ 2008 Annual Plan Item 2(b)(iv)(3)	<p>These dates are dependent on NERC deliverables and may be changed if NERC timelines for Order 890 are changed:</p> <p>FORMAL COMMENT: 2nd Quarter, 2008</p> <p>WEQ EC VOTE: 2nd Quarter, 2008</p> <p>RATIFICATION: N/A</p>	<p>The ESS/ITS and BPS have begun identifying complementary business practices to NERC MOD008.</p> <p>The ESS/ITS and BPS are continuing to evaluate and review the templates and practices for TRM, 8/16/07</p> <p>The ESS/ITS and BPS determined no additional standards needed to be developed for this item and voted for the co-chairs to develop recommendation and post formal comments 3/31/08.</p> <p>Recommendation posted for 30-day formal comment period on April 8th.</p> <p>The recommendation was voted out of the EC on May 13.</p>
□	301	Business Practice Standards for ATC and AFC Calculation Methodologies to complement the NERC reliability standards created for ATC and AFC Methodologies		These dates are dependent on NERC deliverables and may be	The ESS/ITS and BPS has drafted several sets of language

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		<p>(NERC MOD001 (Available Transfer Capability); NERC MOD028 (Network Response Available Transfer Capability); NERC MOD029 (Rated System Path Available Transfer Capability); and NERC MOD030 (Flowgate Network Response Available Transfer Capability)):</p> <ul style="list-style-type: none"> Business practice standards to address the frequency and posting requirements for all ATC components that are complementary to the related NERC reliability standards (Paragraph 301 will require coordination with the NERC Order 890 reliability standards development) <p>Order 890-A:</p> <p>53. We clarify in response to NorthWestern that TRM may be used to accommodate the procurement of ancillary services used to provide service under the pro forma OATT. We deny as premature EPSA's and Williams' requests for clarification regarding the realtime determination and posting of ATC and AFC values, as well as posting of utilization of transmission provider's own system ETC. In Order No. 890, the Commission required an exchange of the data both for short and long-term ATC/AFC calculation that will increase the accuracy of ATC calculations.³³ The Commission also required that ATC be recalculated by all transmission providers on a consistent time interval, and in a manner that closely reflects the actual topology of the system, load forecast, interchange schedules, transmission reservations, facility ratings, and other necessary data, and that NERC/NAESB revise the related reliability standard and business practices accordingly.³⁴ EPSA and William should address their concerns through the NERC and NAESB processes implementing these requirements.</p> <p>60. Order No. 890 requires NERC and NAESB to develop a single set of ATC-related standards that will apply to all transmission providers, including RTOs and ISOs. We understand that the NERC ATC standard drafting team includes representatives from various industry sectors, including RTOs/ISOs, and we encourage NYISO to participate in the standard development process to provide NERC an opportunity to address its concerns. To the extent NYISO feels its concerns are not address in this process, it should bring the issue to the Commission's attention on review of the resulting reliability standards.</p> <p>101. The Commission directed public utilities, working through NERC and NAESB, to revise reliability standard MOD-001 to require ATC to be recalculated by all transmission providers on a consistent time interval and in a manner that closely reflects the actual topology of the system, e.g., generation and transmission outages, load</p>	<p>WEQ 2008 Annual Plan Item 2(b)(v)(1)</p>	<p>changed if NERC timelines for Order 890 are changed: FORMAL COMMENT: 2nd Quarter, 2008 WEQ EC VOTE: 3rd Quarter, 2008 RATIFICATION: N/A</p>	<p>and is in the process of coordinating alignment with the NERC ATC Drafting Team.</p> <p>The ESS/ITS and BPS are drafting documents that will facilitate agreement on concepts/scope.</p> <p>The ESS/ITS and BPS determined no additional standards needed to be developed for this item and voted for the co-chairs to develop recommendation and post formal comments 4/16/08.</p> <p>Recommendation posted for 30-day formal comment period on April 23rd.</p> <p>Approved by WEQ EC August 19, 2008.</p>

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		<p>forecast, interchange schedules, transmission reservations, facility ratings, and other necessary data. The Commission stated that this process must also consider whether ATC should be calculated more frequently for constrained facilities.</p> <p>104. The Commission agrees with Powerex that the standards adopted through the NERC and NAESB processes should serve as minimum or "no less frequent than" requirements to recalculate ATC. Transmission providers also must update their ATC calculation when they receive substantial and material changes in data, such as updated load forecasts, changes in topology and dispatch patterns, which may be more frequent than the NERC and NAESB standards would otherwise require. In the absence of substantial and material changes in data, transmission providers are not required to update ATC on a more frequent basis than the minimum frequency that the NERC and NAESB standards require, once implemented. The Commission will consider the adequacy of the time frame for ATC updates on review of these standards.</p> <p>148. In Order No. 890, the Commission required transmission providers to make available, upon request, all data used to calculate ATC, TTC, CBM and TRM for any constrained posted path. We believe that this adequately addresses Constellation's request for access to modeling data used by the transmission provider. Specifically, we expect transmission providers to make available, upon request and subject to appropriate confidentiality protections and CEII requirements, the following modeling data: (1) load flow base cases and generation dispatch methodology; (2) contingency, subsystem, monitoring, change files and accompanying auxiliary files; (3) transient and dynamic stability simulation data and reports on flowgates which are not thermally limited; (4) list of transactions used to update the base case for transmission service request study; (5) special protection systems and operating guides, and specific description as to how they are modeled; (6) model configuration settings; (7) dates and capacities of new and retiring generation; (8) new and retired generation included in the model for future years; (9) production cost models (including assumptions, settings, study results, input data, etc.), subject to reasonable and applicable generator confidentiality limitations; (10) searchable transmission maps, including PowerWorld or PSSE diagrams; (11) OASIS names to Common Names table and PTI bus numbers; and, (12) flowgate and interface limits including limit category (thermal, steady state or transient, voltage or angular). We decline, however, to require the transmission provider to post this information on OASIS, as Constellation suggests. We conclude that making this information available on request provides sufficient transparency for customers without unduly burdening the transmission provider.</p>			

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		<p>149. With regard to the modeling support information sought by Constellation, we believe much of this information should already be stated in each transmission provider's Attachment C. In Order No. 890, the Commission required each transmission provider to set forth in the Attachment C to its OATT the ATC calculation methodology used by the transmission provider. To the extent necessary, we clarify that the step-by-step modeling study methodology and criteria for adding or eliminating flowgates (permanent and temporary) is part of the ATC methodology that must be stated in the transmission provider's Attachment C. We direct any transmission provider that has failed to include this information in its Attachment C to include that information as part of the compliance filing directed in section I.I.C. If the transmission provider has already satisfied this obligation in a previous compliance filing, it should refer to that filing instead.</p> <p>150. We deny as premature Constellation's request to require OASIS postings of additional model benchmarking and forecasting data/TSR study audit data. Such information would be utilized in the process of updating and benchmarking models to actual events, which is the subject of ongoing efforts to modify relevant reliability standards from the MOD and facilities design, connections and maintenance (FAC) groups.</p> <p>152. We deny TDU Systems' request to require transmission providers to grant customers access to proprietary modeling software used to calculate ATC values. The Commission believes at this time that the requirements of Order No. 890 are sufficient to achieve the Commission's transparency goals without further requiring the disclosure of proprietary software.</p>			

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□	310	<ul style="list-style-type: none"> Business practice standards for data exchange for ATC modeling complementary to the related NERC reliability standards including any OASIS posting requirements to achieve the data exchange (Paragraph 310 will require coordination with the NERC Order 890 reliability standards development) 	WEQ 2008 Annual Plan Item 2(b)(v)(2)	<p>These dates are dependent on NERC deliverables and may be changed if NERC timelines for Order 890 are changed:</p> <p>FORMAL COMMENT: 2nd Quarter, 2008</p> <p>WEQ EC VOTE: 2nd Quarter, 2008</p> <p>RATIFICATION: N/A</p>	<p>NERC will be addressing data exchange standards and will identify any new OASIS posting requirements or template query requirements which are needed in order to facilitate data exchange for ATC modeling</p> <p>On March 13, 2008 the ESS/ITS and BPS determined the work associated to this item has been completed by NERC and recommended no further action be taken by NAESB.</p> <p>Recommendation posted for 30-day formal comment period on March 17th.</p> <p>The recommendation was voted out of the EC on May 13.</p>
□	369	<ul style="list-style-type: none"> Business practice standards that will set forth how transmission providers will post “explanations of the reason for a change in monthly and yearly ATC values on a constrained path.” The standards will include a requirement that the transmission provider post the reason for the change in a narrative form. The posted information will include “the (1) specific events which gave rise to the change and (2) new values for ATC on that path (as opposed to all points on the network).” (Paragraph 369 will not require coordination with the NERC Order 890 reliability standards development) <p>Although not specified in the WEQ 2008 AP, it is expected that this standard will also contain requirements associated with annotations when ATC remains at zero for six months or longer.</p> <p>Order 890-A:</p> <p>124. We believe that E.ON U.S. overestimates the burden of complying with this requirement. Since TTC standardization is ongoing, it is impossible to identify with</p>	WEQ 2008 Annual Plan Item 2(b)(v)(3)	<p>FORMAL COMMENT: 1st Quarter, 2008</p> <p>WEQ EC VOTE: 2nd Quarter, 2008</p> <p>RATIFICATION: 2nd Quarter, 2008</p>	<p>Voted out of subcommittee for formal comment on February 13, 2008.</p> <p>Approved by the EC via notational ballot on April 14th.</p> <p>Membership ratification completed on May 16th.</p>

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		<p>precision the steps that will need to be taken to comply with the posting requirement. The appropriate forum to raise concerns regarding the burden of particular TTC calculation requirements is in the NAESB standards development process. In any event, we would expect that the posting of narratives for changes in monthly and yearly ATC values as a result of a 10 percent change in TTC will be triggered mainly by topology changes resulting from transmission lines and generator in-service status, as well as new facilities additions, that are reported on OASIS.</p> <p>125. We clarify in response to Southern that transmission providers do not need to list each and every circumstance or occurrence that impacts TTC values from the previous month or year and, instead, may list the primary events that give rise to the update. Again, we expect that TTC changes will generally result from topology changes and, therefore, the primary reasons for an update would be changes in schedules of transmission or generation additions, prolonged outages, or changes in maintenance schedules causing a TTC change of 10 percent. We agree with Southern that the transmission provider should post these narrative explanations on OASIS via a template and data element that is to be defined by NAESB. We direct transmission providers, working through NAESB, to develop the OASIS functionality necessary for such postings. Pending completion of this work by NAESB, we direct transmission providers to post these narrative explanations as comments on OASIS.</p>			
□	413	<ul style="list-style-type: none"> Business practice standards for posting on OASIS of the “underlying load forecast assumptions for all ATC calculations” (Paragraph 413 will not require coordination with the NERC Order 890 reliability standards development) <p>Order 890-B:</p> <p>35. We clarify, however, that the Commission intended for transmission providers to post the underlying factors used to make load forecasts that have a significant impact on calculations, such as temperature forecasts, not all economic and other data that underlies each and every daily load forecast. Transmission providers must post a description of their load forecast method including how economic and weather assumptions are used in load forecasting. The Commission’s intent is to increase transparency in the transmission provider’s process of forecasting, providing assurance to customers that loads are consistently being forecast using methodologies which are not subject to daily manipulation to favor affiliates.</p>	WEQ 2008 Annual Plan Item 2(b)(v)(4)	<p>These dates are dependent on NERC providing responses to questions forwarded to NERC by the BPS/ESS/ITS.</p> <p>FORMAL COMMENT: 2nd Quarter, 2008</p> <p>WEQ EC VOTE: 2nd Quarter, 2008</p> <p>RATIFICATION: 2nd Quarter, 2008</p>	<p>Voted out of subcommittee for formal comment on March 10, 2008.</p> <p>Approved by the EC via notational ballot on April 23rd.</p> <p>Recommendation was posted for membership ratification on June 23rd.</p> <p>Membership ratification completed on July 23rd.</p>

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□	405	<ul style="list-style-type: none"> Business practice standards for posting on OASIS of the “actual daily peak load for the prior day.” (Paragraph 405 will not require coordination with the NERC Order 890 reliability standards development) 	WEQ 2008 Annual Plan Item 2(b)(v)(5)	FORMAL COMMENT: 1 st Quarter, 2008 WEQ EC VOTE: 2 nd Quarter, 2008 RATIFICATION: 2 nd Quarter, 2008	Voted out of subcommittee for formal comment on March 10, 2008. Approved by the EC via notational ballot on April 23 rd . Recommendation posted for Membership Ratification on June 23 rd . Membership ratification completed on July 23 rd .
□		<ul style="list-style-type: none"> Business practice standards to complement NERC reliability standards for Transfer Capability in response to new NERC Supplemental SAR: Revisions to Existing Standards MOD001-MOD009, FAC12-13 (This item was added as a result of the Supplemental SAR NERC created in case additional business practices are needed as a result of the work on this SAR by NERC. It does not have a cite in Order 890. This item will require coordination with the NERC Order 890 reliability standards development). 	WEQ 2008 Annual Plan Item 2 (b)(vi)	These dates are dependent on NERC deliverables and may be changed if NERC timelines for Order 890 are changed: FORMAL COMMENT: 2 nd Quarter, 2008 WEQ EC VOTE: 3 rd Quarter, 2008 RATIFICATION: N/A	The ESS/ITS and BPS is in the process of coordinating alignment with the NERC ATC Drafting Team. On May 1, 2008, the subcommittee determined no additional standards were required for this work plan item. Posted for formal comments on May 5, 2008. Approved by WEQ EC August 19, 2008.
□		<ul style="list-style-type: none"> Business practice standards to set forth the procedure for input on TTC and ATC methodologies and values. (During the Order 890 NERC and NAESB joint standards development effort, it was determined that the standards contained in MOD003 should be business practice standards instead of reliability standards. NERC has requested that NAESB adopt the standards as business practices via correspondence to Ms. McQuade, NAESB President.) This item will require coordination with the NERC Order 890 reliability standards development because the language to address this item is contained within a draft standard that addresses items that are dependent on NERC deliverables, i.e., the requirements to create an 	WEQ 2008 Annual Plan Item 2 (b)(vii)	These dates are dependent on NERC deliverables and may be changed if NERC timelines for Order 890 are changed: FORMAL COMMENT: 2 nd Quarter, 2008 WEQ EC VOTE: 2 nd Quarter, 2008	Voted out of subcommittee for formal comment on March 13, 2008. Approved by the EC via notational ballot on May 2, 2008. Membership ratification period closes June 27, 2008.

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		“ATC Information Link” on OASIS. There is no Order 890 cite for this item.		RATIFICATION: 2 nd Quarter, 2008	Recommendation was ratified by the membership on June 27, 2008.
□		Develop any additional business practice standards to support transparency reporting and related functions that may be required as a result of the final order.	WEQ 2008 Annual Plan Item 2(c)	FORMAL COMMENT: 3 rd Quarter, 2008 WEQ EC VOTE: 4 th Quarter, 2008 RATIFICATION: N/A	The ESS/ITS and BPS continue to review the need for additional business practice standards. The ATC information list was posted for informal comment on January 22, 2008. 05-13-2008 - The BPS/ESS/ITS was directed by the EC to suspend activity on this item. ATC Information List has been assigned to a task force of the EC. Voted out of EC task force for formal comment period ending September 17, 2008. No action recommendation approved by WEQ EC on October 6, 2008.
□		Modify WEQ-001 to reflect in the definition of certain ancillary services that such ancillary services may be provided by non-generation resources such as demand resources. (http://www.naesb.org/pdf3/weq_ec051308w2.doc)	WEQ 2008 Annual Plan Item 6(d)	FORMAL COMMENT: 3 rd Quarter, 2008 WEQ EC VOTE: 3 rd Quarter, 2008 RATIFICATION: 3 rd Quarter, 2008	Commissioner Wellinghoff letter Draft recommendation posted for informal comments on June 17, 2008 Recommendation was voted out of subcommittee on July 9 th . Formal Comment period closes on August 11 th .

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					Approved by WEQ EC August 19, 2008. Ratified by the membership on 9/22/2008.
ESS/ITS ASSIGNMENTS					
GROUP 0: RESALES					
□	815, FN 496	<p>The OASIS business practices developed to align the existing NAESB standards with Order 890 will include the requirement that “all sales or assignments of capacity be conducted or otherwise posted on the transmission provider’s OASIS on or before the date the reassigned service commences.”</p> <p>The OASIS business practices will also conform to Footnote 496 of Order 890. The business practices will include the requirement that the assignee “execute a service agreement directly with the transmission provider.” In addition, the business practices will include the requirement that the assignee pay “the transmission provider for service at the negotiated rate and the transmission provider will bill or credit the assignor with any the difference between the negotiated rate and the assignor’s original rate.</p> <p>Order 890-A:</p> <p>394. Reforms to the rules governing reassignments and associated reporting obligations also increase our regulatory oversight of the secondary market, allowing the Commission to effectively monitor that market for any attempts to exercise market power. All reassignments must now be conducted through or otherwise posted on OASIS and assignees must execute service agreements prior to the date on which service commences. Transmission providers must provide information regarding reassignments in their EQRs. As noted above, Commission staff will also closely monitor the quarterly reassignment-related data submitted by transmission providers and prepare a report on staff’s findings for the Commission’s consideration. The Commission takes seriously the possibility that resellers may attempt to exercise market power in the secondary market for transmission capacity. We continue to believe, however, that the regulatory protections in place and our increased oversight of this market will limit the potential for market power abuse during the period in which the price cap is lifted. There is no need for particularized market power studies regarding secondary transmission capacity, as suggested by TAPS.</p>	WEQ 2007 Annual Plan Item 2(a)(i)	<p>FORMAL COMMENT: Posted for formal comment April 5, 2007 with comments due on May 4, 2007.</p> <p>WEQ EC VOTE: The WEQ Executive Committee adopted a revised recommendation during the May 8, 2007 WEQ EC meeting.</p> <p>RATIFICATION: The recommendation, as revised by the WEQ Executive Committee was posted for member ratification on June 22, 2007 with ballots due on July 23, 2007. The ratification results are posted on the NAESB website.</p>	<p>Completed.</p> <p>The final action is posted on the NAESB WEQ Final Actions page: 2007 WEQ Annual Plan Item 2 Final Action - Recommendation for Revision to Final Action R04006D to align the Resales Standards with Order 890</p> <p>The Subcommittee believes the final action conforms with Order 890-A.</p>

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		<p>408. As noted above, the Commission required in Order No. 890 that all sales or assignments of capacity be conducted through or otherwise posted on the transmission provider's OASIS on or before the date the reassignment commences. The Commission thus eliminated the ability of transmission customers to assign transmission rights to another party with subsequent notification to the transmission provider. The Commission also directed transmission providers, working through NAESB, to develop appropriate OASIS functionality to allow such postings. Transmission providers were not required to implement this new OASIS functionality or any related business practices until NAESB develops appropriate standards.</p> <p>422. The Commission affirms the decision in Order No. 890 to require assignees to execute a service agreement with the transmission provider governing reassignments of transmission capacity prior to scheduling use of that capacity. We provide clarification of this requirement, however, in response to the concerns raised by petitioners. In Order No. 890, the Commission required that all reassignments be accomplished by the assignee executing a service agreement with the transmission provider that will govern the provision of reassigned service. The Commission did not intend to impose contracting obligations that are more onerous than the acquisition of primary transmission capacity, which may be accomplished through execution of a service agreement followed by scheduling on OASIS. We clarify that it is equally sufficient for an assignee to execute a service agreement governing its reassignments of capacity generally and to complete a particular assignment through the OASIS. However, as with reservations of primary transmission capacity, there remains a threshold requirement to execute a service agreement with the transmission provider in order to commit the assignee to abide by the terms and conditions of the transmission provider's OATT governing the reassignment of transmission service.</p> <p>423. It would not be appropriate to relieve assignees of the obligation to execute a service agreement with the transmission provider since such agreements establish the necessary contractual relationship between the assignee and the transmission provider. As we explain above, sales of reassigned capacity now take place under the transmission provider's OATT and, thus, there must be a contractual relationship between these parties. This does not mean, however, that all of the terms and conditions of a particular assignment must be stated in the service agreement. Like short-term firm and non-firm reservations of primary capacity, the transmission provider and assignee may rely on OASIS to provide information regarding the reseller, quantity, and price associated with a particular reassignment of service. This information would then become part of the binding agreement between the transmission provider and assignee governing the</p>			

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		<p>assignment, just as confirmation of short-term firm and non-firm transactions on OASIS constitute binding contractual commitments. Because execution of a service agreement with the transmission provider governing reassignments of capacity is a threshold requirement for an assignee wishing to accomplish a particular reassignment on OASIS, Bonneville’s concern regarding the failure of an assignee to return its service agreement is misplaced. The assignee in that instance would have no right to schedule a reassignment on OASIS since it has not first executed the appropriate service agreement with the transmission provider.</p> <p>424. Some of the confusion regarding these contracting requirements may have been caused by the Commission’s reference in section 23.1 of the revised pro forma OATT to a service agreement “that will govern the provision of reassigned service,” which could be interpreted to refer to transaction-by-transaction service agreements for reassignments. Inclusion of the words “Long-Term Firm” in both the title of the form of service agreement and the attached specifications in the new Attachment A-1 to the pro forma OATT adopted in Order No. 890 may have added to the confusion by potentially implying that use of the service agreement is limited to long-term firm point-to-point transactions instead of also applying to short-term firm point-to-point and non-firm point-to-point reassignments, as intended by the Commission. We revise section 23.1 of the pro forma OATT and the title of Attachment A-1 to make clear that use of the form of service agreement for reassigned capacity, and associated posting of schedules and transaction information on OASIS, should be similar to the use of such agreements for primary capacity.</p> <p>425. The execution of a service agreement by the assignee does not itself terminate the reseller’s service agreement, as EEI argues. The reseller’s service agreement remains in place, granting the reseller scheduling rights for the reserved capacity and obligating the reseller to pay for that reservation. During the term of the assignment, the reseller will continue to be billed under its agreement with the transmission provider. The assignment of service simply transfers to the assignee some or all of the reseller’s scheduling rights for the period of the reassignment and, in return, obligates the assignee to pay the transmission provider the negotiated rate. In order to prevent over-recovery by the transmission provider, the transmission provider must therefore credit the reseller the reassignment rate, which leaves the reseller with the net difference between the resale rate and the reseller’s original rate. If the assignee defaults and fails to pay for the reassigned capacity, the transmission provider should reverse the credit to the reseller to reflect the lack of payment by the assignee.</p>			

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		<p>426. We disagree that these billing requirements are unduly burdensome. While it is true that the transmission provider may be required to bill at different rates, that is already the case under the pro forma OATT. Transmission providers are permitted to offer discounts from the rates stated in their OATT, provided they offer such discounts to all eligible customers. Offering discounts thus creates different rates for different customers depending on when they negotiate service. The transmission provider therefore should already have mechanisms in place to bill customers based on rates other than those stated in its OATT. In any event, the need to bill assignees directly for reassignments is inextricably linked to the decision to require that all reassignment transactions take place pursuant to the rate on file in the transmission provider's OATT, rather than bilateral agreements between customers. We therefore do not intend for the discount rule or the price ceilings otherwise stated in the transmission provider's OATT to apply to reassignments of capacity. We have revised schedules 7 and 8 of the pro forma OATT accordingly.</p> <p>427. We clarify that, to the extent necessary, the costs incurred by the transmission provider to account and bill for reassignments of transmission capacity should be included in the transmission provider's cost of service, just like accounting and billing costs for any other service under the transmission provider's OATT. We decline MidAmerican's request to prohibit further assignments of reassigned capacity. Order No. 888 allowed for multiple reassignments under the pro forma OATT and MidAmerican does not justify departing from this practice. Just as the original transmission customer may find that it has excess capacity it can reassign, so may an assignee. Denying the assignee's right to further assign its scheduling rights would inhibit customers who value the capacity most from accessing it and thereby contradict the Commission goal of creating a competitive secondary market for transmission capacity.</p> <p>428. With regard to OASIS modifications necessary to allow for the reassignment of transmission capacity, the Commission in Order No. 890 already directed transmission providers working through NAESB to develop appropriate OASIS functionality to allow for reassignment-related postings. We understand that this work is on-going and expect any necessary modifications to NAESB's business practices that are necessary to reflect our rulings in this order will be adopted prior to the submission of those standards for Commission review. In the interim, transmission providers should identify in their business practices any procedures necessary to accomplish the reassignment of capacity by their customers.</p>			

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		GROUP 1: ANNOTATIONS FOR ATC; LOAD FORECAST AND ACTUAL LOAD; RE-BID OF PARTIAL SERVICE; PRECONFIRMATION PRIORITY; and CONDITIONAL FIRM			
		Conditional Firm, Annotations For ATC; Load Forecast And Actual Load; Re-Bid Of Partial Service; And Preconfirmation Priority S&CP Requirements	WEQ 2008 Annual Plan Item 2(a)(i)(1)	FORMAL COMMENT: Sent during the 3rd Quarter 2007. WEQ EC VOTE: EC notational ballot due January 16, 2008. RATIFICATION: The ratification of the Recommendation will be completed during 1 st Quarter 2008.	Split into individual items – see below
□	1078	<p>Conditional Firm: In Paragraph 1078 of Order 890, the Commission directed transmission providers to “assign short-term firm service to conditional firm customers as the service becomes available.” The Commission also directed transmission providers to work with NAESB to “develop the appropriate communications protocols to implement this attribute of conditional firm service.” NAESB will develop OASIS business practices (to complement the OASIS S&CPs developed in 2008 AP item 2(a)(i)(1))that will implement the ability to assign short-term firm service to conditional firm customers.</p> <p>Development of communication protocols for conditional firm including tracking mechanism and regional variation. Need to review the tagging rules related to the use of conditional firm.</p> <p>Order 890-A:</p> <p>566. During non-conditional periods, conditional firm service is subject to pro rata curtailment consistent with curtailment of any other long-term firm service. During the hours or specific system conditions when conditional firm service is conditional, conditional firm service share the same curtailment priority as secondary network service. In such circumstances, transmission providers will be allowed to curtail only for reliability reasons and conditional firm customers during conditional curtailment hours will be curtailed only after all point-to-point non-firm customers have been curtailed. If the customer selects the annual hourly cap option, the transmission provider will have the flexibility to conditionally curtail the customer for any reliability reason during those hours, including but not limited to, the system condition(s) identified in the system impact study.</p>	WEQ 2008 Annual Plan Item 2(a)(i)(2)	FORMAL COMMENT: 3 rd Quarter, 2008 WEQ EC VOTE: 3 rd Quarter, 2008 RATIFICATION: 3 rd Quarter, 2008	<p>Initial working paper of draft requirements to be posted in April 2008.</p> <p>On April 4, 2008, the ESS/ITS voted to send this recommendation out for informal comments due April 11, 2008.</p> <p>Voted out of subcommittee for formal comment on June 24, 2008.</p> <p>Recommendation posted for 30-day formal comment period on June 25th.</p> <p>Approved by WEQ EC on August 8, 2008</p> <p>Ratified by the membership on 9/25/2008.</p>

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		<p>567. The Commission provided that short-term firm service reserved prior to the reservation of conditional firm service will maintain priority over conditional firm service in the periods when conditional firm service is conditional, i.e., when specified system conditions exist or conditional curtailment hours apply. Transmission providers were directed to work with NAESB to develop the appropriate communications protocol to allow for automatic assignment of short-term firm point-to-point service to conditional firm customers to the extent short-term service becomes available. Transmission providers need not implement this requirement until NAESB develops appropriate communications protocols.</p> <p>569. Finally, the Commission recognized that there may be some regional variation in the way transmission providers approach the provision of conditional firm service beyond the minimum attributes that established in Order No. 890. The Commission directed transmission providers located in the same region to coordinate among themselves to develop business practices for implementation of the conditional firm service. In order to allow time for this regional coordination, the Commission directed transmission providers to implement these mechanisms and business practices within 180 days after the publication of this Final Rule in the Federal Register, or October 11, 2007.</p> <p>585. We also agree with MidAmerican that a transmission provider's waiver of a reassessment for conditional firm or planning redispatch service does not constitute a waiver of all reassessments for the duration of the service, unless explicitly agreed to by the transmission provider. We reiterate, however, that only one reassessment may be performed in each two-year period of service. We also affirm that any waiver must be granted for similarly situated service, which would include conditional firm or planning redispatch service that is limited because of the same constraints or general system limitations. Such a waiver would be an act of discretion that must be posted on OASIS. Waiver of the reassessment presents an opportunity for discrimination among classes of customers on the part of the transmission provider and posting will provide eligible customers with an indicator of how often conditions or redispatch requirements have been reassessed. Transmission providers are directed to develop uniform OASIS posting standards, in coordination with NAESB, for transmission providers to post information regarding waivers of the biennial reassessment for planning redispatch and conditional firm service.</p>			

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□	369	Annotations for ATC: OASIS Business Practice Standards (to complement the OASIS S&CPs developed in 2008 AP item 2(a)(i)(1)) that will “require that the transmission provider post a brief, but specific, narrative explanation of the reason for a change in monthly and yearly ATC values on a constrained path.” The posting requirements will include posting of “(1) specific events which gave rise to the change and (2) new values for ATC on that path (as opposed to all points on the network).”	WEQ 2008 Annual Plan Item 2(a)(i)(3)	FORMAL COMMENT: 1 st Quarter, 2008 WEQ EC VOTE: 2 nd Quarter, 2008 RATIFICATION: 2 nd Quarter, 2008	Assigned to BPS/ESS/ITS (see above BPS/ESS/ITS item that reference WEQ 2008 AP Item 2(b)(v)(3)). Voted out of subcommittee for formal comment on February 13, 2008. Approved by the EC via notational ballot on April 14 th . Membership ratification to be completed by May 16 th . Ratified by the membership on 5/16/2008.
□	416	Load Forecast and Actual Load: OASIS Business Practice Standards (to complement the OASIS S&CPs developed in 2008 AP item 2(a)(i)(1)) for the posting of “load forecasts and actual daily peak load for both system-wide load (including native load) and native load.” Order 890-B: 35. We clarify, however, that the Commission intended for transmission providers to post the underlying factors used to make load forecasts that have a significant impact on calculations, such as temperature forecasts, not all economic and other data that underlies each and every daily load forecast. Transmission providers must post a description of their load forecast method including how economic and weather assumptions are used in load forecasting. The Commission’s intent is to increase transparency in the transmission provider’s process of forecasting, providing assurance to customers that loads are consistently being forecast using methodologies which are not subject to daily manipulation to favor affiliates.	WEQ 2008 Annual Plan Item 2(a)(i)(4)	FORMAL COMMENT: 2 nd Quarter, 2008 WEQ EC VOTE: 2 nd Quarter, 2008 RATIFICATION: 2 nd Quarter, 2008	Assigned to BPS/ESS/ITS (see above BPS/ESS/ITS item that reference WEQ 2008 AP Items 2(b)(v)(4) and (5)). Voted out of subcommittee for formal comment on March 10, 2008. Approved by the EC via notational ballot on April 23 rd . Membership ratification completed on July 23 rd .
□	1378	Re-bid of Partial Service: OASIS Business practice standards (to complement the OASIS S&CPs developed in 2008 AP item 2(a)(i)(1)) for re-bid of partial service across a single Transmission Provider’s system.	WEQ 2008 Annual Plan Item 2(a)(i)(5)	FORMAL COMMENT: 1 st Quarter, 2008 WEQ EC VOTE: 1 st Quarter, 2008 RATIFICATION: 1 st Quarter, 2008	Voted out of subcommittee for formal comment on 2/12/2008. WEQ EC adopted the recommendation on May 13.

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					Membership ratification to be completed by June 23 rd . Recommendation was ratified by the membership on June 23 rd .
□	1392, 1401	Pre-confirmation Priority: Development of OASIS business practice standards (to complement the OASIS S&CPs developed in 2008 AP item 2(a)(i)(1)) to prohibit “transmission customers from changing a request into a pre-confirmed request and requiring OASIS platforms to be accessible on non-Windows/Explorer computers.” Pre-confirmation Priority: Development of OASIS Business Practice Standards and OASIS S&CPs so that “pre-confirmed non-firm point-to-point transmission service requests and short-term firm point-to-point transmission service requests” have priority though “longer duration requests for transmission service will continue to have priority over shorter duration requests for transmission service.” The standards will be written such that pre-confirmation will serve as a “tie-breaker” when the requests are of equal duration.	WEQ 2008 Annual Plan Item 2(a)(i)(6)	FORMAL COMMENT: 1 st Quarter, 2008 WEQ EC VOTE: 1 st Quarter, 2008 RATIFICATION: 1 st Quarter, 2008	Voted out of subcommittee for formal comment on 2/12/2008. WEQ EC adopted the recommendation on May 13. Membership ratification to be completed by June 23 rd . Recommendation was ratified by the membership on June 23 rd .
□		Appendix C – OASIS Exemptions	WEQ 2008 Annual Plan Item 2(a)(i)(7)	FORMAL COMMENT: Voted out of subcommittee 12/17/2007. Formal Comment period 12/19/2007 through 1/19/2008. WEQ EC VOTE: Approved February 4, 2008 RATIFICATION: Ratification period to close 3/13/2008	Ratified by the membership on 3/13/2008.
GROUP 2: METRICS; REDISPATCH COST POSTING					
□	413	Metrics: Business Practice standards to “post on OASIS metrics related to the provision of transmission service under the OATT” including the posting of: <ul style="list-style-type: none"> “the number of affiliate versus non-affiliate requests for transmission service that have been rejected”; “the number for affiliate versus non-affiliate requests for transmission service that have been made”; 	WEQ 2008 Annual Plan Item 2(a)(ii)(1)	FORMAL COMMENT: 1 st Quarter, 2008 WEQ EC VOTE: 1 st Quarter, 2008 RATIFICATION: 1 st Quarter, 2008	Voted out of subcommittee for formal comment on 2/12/2008. WEQ EC adopted the recommendation on May 13. Membership ratification to be completed by June 23 rd .

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		These standards will also set forth in the above referenced posting requirements the length of the service request and the type of the service requested.			Recommendation was ratified by the membership on June 23 rd
□	1318	<p>Metrics: OASIS business practice standards to implement the standard performance (planning study) metrics set forth in Order 890, Paragraphs 1308-1317.</p>	WEQ 2008 Annual Plan Item 2(a)(ii)(2)	<p>FORMAL COMMENT: 1st Quarter, 2008</p> <p>WEQ EC VOTE: 1st Quarter, 2008</p> <p>RATIFICATION: 1st Quarter, 2008</p>	<p>Voted out of subcommittee for formal comment on 2/12/2008.</p> <p>WEQ EC adopted the recommendation on May 13.</p> <p>Membership ratification to be completed by June 23rd.</p> <p>Recommendation was ratified by the membership on June 23rd</p>
□	1162	<p>Redispatch Cost Posting: Business practices for redispatch cost postings:</p> <ul style="list-style-type: none"> The posting of redispatch information will also include the posting of each transmission provider's "monthly average cost of redispatch for each internal congested transmission facility or interface over which it provides redispatch service using planning redispatch or reliability redispatch under the pro forma OATT." The business practice standards for redispatch cost postings will also include functionality for transmission providers to post "a high and low redispatch for the month" each internal congested transmission facility or interface over which it provides redispatch service. <p>Order 890-A:</p> <p>621. Transmission providers must post internal constraint or interface data for the month if any planning redispatch or reliability redispatch is provided during the month, regardless of whether the transmission customer is required to reimburse the transmission provider for those exact costs. Thus, if the transmission customer pays for planning redispatch pursuant to a negotiated fixed rate, the transmission provider is required to post and calculate the monthly average redispatch costs and the high and low costs in the month even though the transmission provider will bill the customer the fixed rate. The same posting requirement applies if the customer is paying a monthly "higher of" rate. The Commission concluded that the relevant reliability redispatch costs for posting purposes are those costs the transmission provider invoices network customers based on a load ratio share pursuant to section 33.3 of the pro forma OATT. The</p>	WEQ 2008 Annual Plan Item 2(a)(ii)(3)	<p>FORMAL COMMENT: 1st Quarter, 2008</p> <p>WEQ EC VOTE: 1st Quarter, 2008</p> <p>RATIFICATION: 1st Quarter, 2008</p>	<p>Voted out of subcommittee for formal comment on 2/12/2008.</p> <p>WEQ EC adopted the recommendation on May 13.</p> <p>Membership ratification to be completed by June 23rd.</p> <p>Recommendation was ratified by the membership on June 23rd</p>

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		transmission provider must post this data on OASIS as soon as practical after the end of each month, but no later than when it sends invoices to transmission customers for redispatch-related services. The Commission directed transmission providers to work in conjunction with NAESB to develop this new OASIS functionality and any necessary business practice standards.			
GROUP 3: NETWORK SERVICE ON OASIS					
I	385	Development of OASIS business practice standards and OASIS S&CPs for “transmission providers and network customers to use OASIS to request designation of new network resources and to terminate designation of network resources.” Shall be posted on OASIS for 90 days and available for audit for a 5 year period.	WEQ 2009 Annual Plan Item 2(a)(i)(1) See also WEQ 2009 Annual Plan items 2(b)(i)(1) and 3(a)(i)	FORMAL COMMENT: 4 th Quarter, 2009 WEQ EC VOTE: 2010 RATIFICATION: 2010	Concept Paper posted 11/7/2007. Concepts discussions continued 1 st Quarter 2009.
I	385	The standards will include the ability to electronically query requests to designate and terminate network resources and will require development of OASIS templates and to allow for queries of all information provided with designation requests. Order 890-B: 209. We also conclude that concerns regarding the ability to verify or monitor the buyer’s decision to designate a purchase of system power as a network resource are overstated in light of the clarification that the buyer and seller must be on the same transmission system. In Order No. 890, the Commission directed transmission providers, working through NERC, to develop OASIS functionality for the designation of network resources and for queries of information provided with designation requests. Parties to a sale of system power on the same transmission system will therefore have ready access to the treatment of the resource. Sellers also may rely on commitments made by the buyer to designate the purchase as a network resource.	WEQ 2009 Annual Plan Item 2(a)(i)(2) See also WEQ 2009 Annual Plan items 2(b)(i)(1) and 3(a)(i)	FORMAL COMMENT: 4 th Quarter, 2009 WEQ EC VOTE: 2010 RATIFICATION: 2010	Concept Paper posted 11/7/2007. Concepts discussions continued 1 st Quarter 2009.
I	1477	The standards will include the ability to mask information “about operating restrictions and generating cost on OASIS”	WEQ 2009 Annual Plan Item 2(a)(i)(3) See also WEQ 2009 Annual Plan items 2(b)	FORMAL COMMENT: 4 th Quarter, 2009 WEQ EC VOTE: 2010 RATIFICATION: 2010	Concept Paper posted 11/7/2007. Concepts discussions continued 1 st Quarter 2009.

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			(i)(1) and 3(a)(i)		
I	1477	<p>Development of OASIS business practice standards and OASIS S&CPs that describe the procedural requirements for submitting designations over any new OASIS functionality.</p> <p>Order 890-A:</p> <p>919. The Commission clarifies, in response to South Carolina E&G’s request, that the language in paragraph 1521 of Order No. 890 is only meant to be a paraphrase of the more detailed attestation to be provided in the pro forma OATT itself. A network customer designating network resources should submit an attestation using the language set forth in sections 29.2(viii) and 30.2 of the pro forma OATT, as amended in Order No. 890, not the language of the preamble. A network customer is not permitted to merely reference the applicable section of the pro forma OATT when completing the attestation requirement. If the OASIS customer comment section does not currently allow enough space for a network customer to provide its attestation, transmission providers should modify, in coordination with NAESB, OASIS functionality to accommodate the full attestation. In the interim, the transmission provider should identify alternate means, such as by telefax or e-mail, for the network customer to provide the attestation.</p>	<p>WEQ 2009 Annual Plan Item 2(a)(i)(4)</p> <p>See also WEQ 2009 Annual Plan items 2(b)(i)(1) and 3(a)(i)</p>	<p>FORMAL COMMENT: 4th Quarter, 2009</p> <p>WEQ EC VOTE: 2010</p> <p>RATIFICATION: 2010</p>	<p>Concept Paper posted 11/7/2007.</p> <p>Concepts discussions continued 1st Quarter 2009.</p>
I	1504	<p>Development of OASIS business practice standards and OASIS S&CPs to specify how designated network service informational postings are posted on OASIS .</p> <p>Develop details of how the view, download, and query requirements for information posted regarding network resource designations informational postings.</p>	<p>WEQ 2009 Annual Plan Item 2(a)(i)(5)</p> <p>See also WEQ 2009 Annual Plan items 2(b)(i)(1) and 3(a)(i)</p>	<p>FORMAL COMMENT: 4th Quarter, 2009</p> <p>WEQ EC VOTE: 2010</p> <p>RATIFICATION: 2010</p>	<p>Concept Paper posted 11/7/2007.</p> <p>Concepts discussions continued 1st Quarter 2009.</p>
I	1532	<p>Development of OASIS business practice standards and OASIS S&CPs to set forth the “treatment of OASIS requests when the customer fails to provide the necessary attestation,” when submitting a request to designate a new network resource.</p> <p>Attestation: Formatting of attestation information that will be provided on OASIS.</p> <p>Order 890-B:</p> <p>182. The Commission grants rehearing to more accurately state the requirement to provide an attestation supporting the designation of network resources pursuant to sections 29.2(viii) and 30.2 of the pro forma OATT. In order to designate a network</p>	<p>WEQ 2009 Annual Plan Item 2(a)(i)(6)</p> <p>See also WEQ 2009 Annual Plan items 2(b)(i)(1) and 3(a)(i)</p>	<p>FORMAL COMMENT: 4th Quarter, 2009</p> <p>WEQ EC VOTE: 2010</p> <p>RATIFICATION: 2010</p>	<p>Concept Paper posted 11/7/2007.</p> <p>Concepts discussions continued 1st Quarter 2009.</p>

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		<p>resource, section 30.7 of the Order No. 888 pro forma OATT required each network customer to demonstrate that (i) it owns or has committed to purchase generation pursuant to an executed contract or (ii) execution of a contract is contingent upon the availability of transmission service in order to designate a generating resource. In Order No. 890, the Commission adopted the attestation requirement as the means by which the network customer can make this demonstration, revising sections 29.2 and 30.2 accordingly. We affirm this requirement, consistent with the network customer's obligations under section 30.7, and grant rehearing of the Commission's statements in this proceeding indicating that the attestation can instead be submitted at the time a resource designation is confirmed, rather than requested.</p> <p>183. We disagree with NRECA and TDU Systems that a customer submitting an attestation pursuant to section 29.2(viii) or 30.2 of the <u>pro forma</u> OATT must commit to purchase the resources for which designation is requested irrespective of the outcome of the network service request. Consistent with section 30.7, a network customer may attest that execution of a contract is contingent upon the availability of transmission service under Part III of the <u>pro forma</u> OATT. Network customers are therefore not required to commit to purchasing a resource prior to submitting a request to designate that resource.</p>			
I	1541	<p>Development of OASIS business practice standards and OASIS S&CPs to describe "the procedural requirements for submitting both temporary and indefinite terminations of network resources, to allow network customers to provide all required information for such terminations." These business practice standards will include the functionality set forth in Order 890, Paragraph 1541.</p>	<p>WEQ 2009 Annual Plan Item 2(a)(i)(7)</p> <p>See also WEQ 2009 Annual Plan items 2(b)(i)(1) and 3(a)(i)</p>	<p>FORMAL COMMENT: 4th Quarter, 2009</p> <p>WEQ EC VOTE: 2010</p> <p>RATIFICATION: 2010</p>	<p>Concept Paper posted 11/7/2007.</p> <p>Concepts discussions continued 1st Quarter 2009.</p>
I	1541	<p>Development of OASIS business practice standards and OASIS S&CPs to describe "the procedures for submitting and processing requests for concomitant evaluations of transmission requests and temporary terminations.</p> <p>Order 890-B:</p> <p>188. In Order No. 890, the Commission directed transmission providers to evaluate as a single request a request for temporary undesignation and related requests for transmission service. Transmission providers were therefore directed to develop, working through NAESB, business practices allowing for electronic identification of</p>	<p>WEQ 2009 Annual Plan Item 2(a)(i)(8)</p> <p>See also WEQ 2009 Annual Plan items 2(b)(i)(1) and 3(a)(i)</p>	<p>FORMAL COMMENT: 4th Quarter, 2009</p> <p>WEQ EC VOTE: 2010</p> <p>RATIFICATION: 2010</p>	<p>Concept Paper posted 11/7/2007.</p> <p>Concepts discussions continued 1st Quarter 2009.</p>

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		<p>related transmission service requests to be evaluated concomitantly with the request for temporary undesignation. This was appropriate in light of the Commission’s decision to allow network customers to temporarily undesignate their network resources without forfeiting the right to use the resource at a specified point in the future, provided they pair the temporary undesignation with a request to redesignate the resource.</p> <p>189. We find that similar procedures for permanent undesignations of network resources are unnecessary given the transmission provider’s obligation to consider clustering transmission service requests at the request of customers. If a network customer or the transmission provider’s merchant function wishes for the transmission provider to take into consideration the effect of a request to terminate a network resource on a concomitant request to designate another network resource, it may request the transmission provider to cluster the requests. As TranServ acknowledges, this will not alter the priority of the network customer or the transmission provider’s merchant function with regard to any ATC that may be made available by undesignating the network resource.</p>			
GROUP 4: PRE-EMPTION; REQUEST R05019; and REVISIONS TO STANDARD 9.7					
N S	1407	<p>Pre-emption: Revise OASIS business practice standards and OASIS S&CPs so that “a new pre-confirmed request for transmission service would preempt a request of equal duration that has been accepted by the transmission provider but not yet confirmed by the transmission customer.” It is the expectation that the business practice standards to address preemption will be developed in conjunction with NAESB Request No. R05019 to modify OASIS standards and OASIS S&CPs to clearly document the procedures used to implement the displacement/interruption terms of the Pro Forma tariff.</p> <p>This is consistent with NAESB Standard WEQ 001-4.25.</p> <p>Order 890-A:</p> <p>814. The Commission affirms the decision in Order No. 890 not to change the “first-come, first served” nature of the reservation process and the right of first refusal. These policies have worked well in the past and, as we explain in Order No. 890, benefit transmission providers and customers alike by facilitating the administration of the reservation process and removing confusion about how to comply.</p> <p>815. We disagree with Duke and TranServ that the right of first refusal policies should be revised based on complex hypotheticals involving the preemption of multiple short-term reservations. The complexities pointed to by these commenters do not by</p>	WEQ 2009 Annual Plan Item 2(a)(ii)(1)	<p>REQUEST FOR RECONSIDERATION PENDING AT FERC MAY IMPACT TARGET DATES.</p> <p>FORMAL COMMENT:4th Quarter, 2009</p> <p>WEQ EC VOTE: 2010</p> <p>RATIFICATION: 2010</p>	Not Started

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		<p>themselves warrant changing the right of first refusal rule. Even though we recognize the potential for complexities to arise under the right of first refusal rule, we believe them to be relatively limited. In the off-chance that multiple eligible customers with short-term reservations choose to exercise their right of first refusal for the same capacity simultaneously, the Commission believes that they should have a right to do so.</p> <p>816. We therefore decline to expand upon the language of the pro forma OATT to account for every factual scenario that could arise under sections 13.2 and 14.2 of the pro forma OATT. Sections 13.2 and 14.2 of the pro forma OATT set forth adequate guidance for transmission providers to fairly administer competing requests, including the priorities for determining which reservations or requests trump one another as well as the timeframes for eligible customers to respond to competing requests. As noted above, we recognize that certain unique cases can present difficult allocation issues, but conclude that these extreme cases arise infrequently in the normal course of business. In the vast majority of cases, we believe the right of first refusal rules are efficient and easy to administer without further amending the governing tariff language, as Bonneville and Southern suggest.</p> <p>817. To the extent necessary, the Commission clarifies that a “competing request” under sections 13.2 and 14.2 of the pro forma OATT may include a transmission service request that overlaps with only part of another existing transmission service reservation since both requests cannot be granted simultaneously. Accordingly, a “competing request” for purposes of sections 13.2 and 14.2 may also include a transmission service request for which transmission capacity cannot be accommodated without preempting one or more existing transmission reservations of parts thereof.</p> <p>818. In response to TranServ and Duke, we clarify that sections 13.2 and 14.2 allow an eligible customer to retain its original reservation by matching the competing service request’s cost or duration terms exactly or by exceeding one or more of the terms of a competing transmission service request. Since any “match” by an eligible customer in response to a potentially preempting request, by definition, either exceeds the costs, duration or both of the eligible customer’s original reservation, we do not believe eligible customers opting to match a competing request have a strong incentive, if any, to “match” a competing request with terms that exceed the competing request. Nevertheless, we do not see any harm resulting from a match that exceeds the exact terms of a competing request and therefore believe it would not be appropriate to preclude the ability of eligible customers to make such a request.</p> <p>819. With regard to reassignments of capacity in the secondary market, we clarify that</p>			

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		<p>the associated right of first refusal under sections 13.2 and 14.2 of the pro forma OATT to match a competing transmission service request applies to the primary transmission service, not the reassignment of scheduling rights. Using TranServ's example, the reassignment of one day of a customer's weekly service would not cause the assignor or the assignee to match a competing three day request for service since the initial one week reservation already exceeded the competing request. The fact that one day of service has been reassigned does not alter the assignor's entitlement to use service for the remaining week reserved.</p> <p>Order 890-B:</p> <p>161. The Commission declines to address in this rulemaking proceeding how transmission providers should resolve complicated and fact-specific scenarios such as the cascading rights of first refusal described by Duke. Sections 13.2 and 14.2 of the <u>pro forma</u> OATT provide adequate guidance for transmission providers to fairly administer the vast majority of competing requests, including priorities for determining which reservations or requests trump one another as well as the timeframes for eligible customers to respond to competing requests. As the Commission explained in Order No. 890-A, we expect that more complex circumstances such as those suggested by Duke will be relatively limited and, therefore, are best addressed on a case-by-case basis. Transmission providers remain free, however, to develop through the NAESB process standard procedures for processing complicated request scenarios.</p>			
N S		<p>NAESB Request No. R05019: During the work to address FERC Order 890, the ESS/ITS will also use the opportunity to modify OASIS standards and S&CP to clearly document the procedures used to implement the displacement/interruption terms of the Pro Forma tariff as requested in NAESB Request No. R05019</p>	<p>WEQ 2009 Annual Plan Item 2(a)(ii)(2)</p> <p>See also WEQ 2009 Annual Plan Item 3(a)(iii)</p>	<p>REQUEST FOR RECONSIDERATION PENDING AT FERC MAY IMPACT TARGET DATES.</p> <p>FORMAL COMMENT: 4th Quarter, 2009</p> <p>WEQ EC VOTE: 2010</p> <p>RATIFICATION: 2010</p>	Not Started
C	1269	<p>Revisions to Standard 001-9.7: NAESB will continue to work to revise NAESB WEQ business practice standard WEQ 001-9.7 (which addresses rollover rights for Redirected transmission service) to be consistent with the Commission's policies.</p> <p>Order 890-A:</p>	<p>WEQ 2009 Annual Plan Item 2(a)(ii)(3)</p>	<p>FORMAL COMMENT: 1st Quarter, 2009</p> <p>WEQ EC VOTE: 2nd Quarter, 2009</p>	On February 11-12, 2008, the ESS/ITS voted to send this recommendation out for informal comments due March

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		<p>697. Pursuant to Section 22 of the pro forma OATT, a transmission customer taking firm point-to-point service may modify its receipt and delivery points, i.e., redirect its service, on either a non-firm or firm basis. In Order No. 676, the Commission adopted the “Standards for Business Practices and Communication Protocols for Public Utilities” developed by the NAESB’s Wholesale Electric Quadrant (WEQ). The WEQ standards include standards addressing requirements for redirects on both a firm and non-firm basis, all of which were incorporated by reference into the Commission’s regulations except for WEQ Standard 001-9.7, which addressed the impact of redirects on the rollover rights of a long-term transmission customer. Order No. 676 directed the WEQ to reconsider WEQ Standard 001-9.7 and develop a revised standard consistent with Commission policy.</p> <p>698. In Order No. 890, the Commission affirmed reliance on the NAESB process to develop business practices implementing the Commission’s redirect policy. The Commission also determined that the reforms adopted in Order No. 676, in combination with the OATT-related reforms adopted in this proceeding, were adequate to ensure that transmission providers do not engage in undue discrimination when a customer seeks to modify its receipt and delivery points on a firm basis. With respect to the effect of redirects on rollover rights, the Commission affirmed its policy allowing a redirect of firm, long-term service to retain rollover rights, even if the redirect is requested for a shorter period. The Commission concluded that a transmission customer should not have to choose between maintaining its rollover rights and redirecting on a firm basis. The Commission noted, however, that any change to a delivery point would be treated as a new request for service for purposes of determining availability of capacity. As a result, a redirect right does not grant the customer access to system capacity or queue position different from other customers submitting new requests for service. The Commission also provided guidance regarding the processing of, and pricing for, redirected service.</p> <p>700. If the Commission decides to maintain rollover rights for redirects, MISO proposes the following limitations and requests the Commission to direct NAESB to draft its business practices accordingly. First, MISO suggests that the primary path agreement should have a term of at least five years for any rollover rights to attach. Second, MISO requests that any redirect must be for firm service for one year or longer. If the redirect is for a shorter period, MISO contends that the rollover rights should remain with the original path. Third, MISO requests redirected service to terminate on the same date as the parent service so as to maintain the timing for execution of rollover rights. Finally, MISO suggests that in order to execute a rollover right the redirected service must be</p>		<p>RATIFICATION: 2nd Quarter, 2009</p>	<p>25, 2008.</p> <p>November 4, 2008 WEQ EC Task Force created</p> <p>January 8, 2009 EC Task Force conference call with FERC Staff</p> <p>February 3, 2009 WEQ EC remanded to ESS-ITS</p> <p>February 4, 2009 ESS-ITS began reconsidering.</p>

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		<p>requested and granted prior to the one-year deadline for the customer to request rollovers along the original path.</p> <p>702. TranServ also requests clarification regarding the requirement for the rollover right to follow the redirect, regardless of the duration of the redirect. TranServ questions whether a redirect of a long-term firm service reservation for one day qualifies that customer for rollover rights on the redirected service points. TranServ suggests that the Commission instead restrict rollover rights on redirected service points to redirects of five years or longer and further require that the redirect be co-terminus with the original request being redirected. TranServ argues that more guidance regarding implementation of the rollover and redirect policies will facilitate the NAESB standards development process.</p> <p>704. The Commission denies petitioners' requests to amend the rights of rollover customers to redirect their service. Under section 22.2 of the pro forma OATT, a request for a firm redirect must be treated like a request for new transmission service. As a new request for service, each redirect request is subject to the availability of capacity and subject to the possibility that the transmission provider may not be able to provide rollover rights on the new redirected path. The transmission provider is required to offer rollover rights to a customer requesting a firm redirect only if rollover rights are available on the redirected path, i.e., to the extent not restricted based on reasonable forecasts of native load growth or preexisting contracts that commence in the future.</p> <p>705. As the Commission explained in Order No. 890, rollover rights follow the redirect regardless of the duration of the redirect. A transmission customer making a firm redirect request does not convert its original long-term firm transmission service agreement into two short-term service agreements, nor does it lose its rollover rights under its long-term firm transmission service agreement. At the same time, a customer can exercise its rollover right only at the end of the contract. Thus, if a customer with rollover rights chooses to redirect its capacity for less than the full remaining term of the contract, absent some further request to redirect, the original path will automatically be reinstated and rollover rights would remain on only the original path. By contrast, if the customer chooses to redirect its capacity until the end of its contract, the customer would have rollover rights along only the redirected path, and only to the extent not restricted based on native load growth or future contracts along the redirected path.</p> <p>706. We therefore reject requests to restrict rollover rights to longer-term redirects. A long-term transmission customer may request multiple, successive redirects for firm service. This discretion is limited by the fact that each successive request is treated as a</p>			

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		<p>new request for service in accordance with section 17 of the pro forma OATT. Each request is therefore subject to the availability of capacity and subject to the possibility that the transmission provider may not be able to provide rollover rights on the new, redirected path. If the customer has not been granted rollover rights for a redirect that extends to the end of its contract, the redirected service will terminate on the same date as the parent service.</p> <p>707. We also reiterate that a customer cannot exercise any rollover rights unless it first has provided the appropriate notice to the transmission provider. If a customer requests and is granted a rollover right prior to the relevant notice deadline (60 days for pre-Order No. 890 agreements or one year for all others) and subsequently requests and is granted a redirect for firm service for the remainder of the contract term (i.e., within the notice period), the new reservation governs the rights at the new receipt and delivery points and the customer can obtain rollover rights with respect to the redirected capacity to the extent rollover rights are available for the redirected points. If, however, a customer fails to request a rollover right prior to the relevant notice deadline, the customer forfeits rollover rights along the current or any redirected path.</p> <p>708. We clarify, to the extent necessary, that transfer capability is not freed up for earlier queued service requests until a redirect has been granted. A redirect request must be evaluated in accordance with section 17 of the pro forma OATT using the same system assumptions and analysis applicable to any other new request for service, including whether sufficient ATC exists to accommodate the request. If there is insufficient ATC to offer service to customers in the queue, and an existing customer requests redirected service, any increase in ATC along the original path is contingent upon the acceptance and confirmation of the redirect. It cannot be assumed at the time of a redirect request that the transmission provider will grant the request.</p>			
		GROUP 5: PARAGRAPH 1377			
N S	1377	<p>NAESB will develop business practice standards to facilitate the coordination of requests across multiple transmission systems using the principles set forth in Paragraph 1377 of Order 890.</p> <p>Develop S&CPs related to coordination of request across multiple transmission systems.</p> <p>Order 890-A:</p> <p>762. The Commission also required transmission providers working through NAESB to develop business practice standards to better coordinate transmission requests across</p>	WEQ 2009 Annual Plan Item 2(a)(iii)(1)	<p>FORMAL COMMENT: 4th Quarter, 2009</p> <p>WEQ EC VOTE: 2010</p> <p>RATIFICATION: 2010</p>	Not Started

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		<p>multiple transmission systems. In order to provide guidance to NAESB, the Commission articulated the principles that should govern processing across multiple systems. The Commission further required transmission providers working through NAESB to develop business practice standards to allow a transmission customer to rebid a counteroffer of partial service so the transmission customer can take the same quantity of service for linked transmission service requests across multiple systems. The Commission explained that the transmission customer should not be required to take the same quantity of service across consecutive transmission service requests and, instead, it should simply have the option to do so.</p> <p>766. The Commission affirms the decision in Order No. 890 to rely on the NAESB process to develop business practices to govern the processing of transmission requests across multiple transmission systems. We decline to dictate at this time, beyond those principles outlined in Order No. 890, the particular practices that must be implemented. It is more appropriate to allow transmission providers working through NAESB, in the first instance, to consider how best to ensure coordination across multiple systems. It is also appropriate to give NAESB an open timeframe to develop these standards since they must be broad enough to account for the complexities of coordinating multi-system transmission service requests.</p>			
N S	1378	<p>Re-bid of Partial Service: OASIS Business practice standards for re-bid of partial service across multiple Transmission Providers' systems.</p> <p>NAESB will develop business practice standards to "allow a transmission customer to rebid a counteroffer of partial service so the transmission customer is allowed to take the same quantity of service across all linked transmission service requests.</p>	WEQ 2008 Annual Plan Item 2(a)(iii)(2)	<p>FORMAL COMMENT: 4th Quarter, 2009</p> <p>WEQ EC VOTE: 2010</p> <p>RATIFICATION: 2010</p>	Not Started
GROUP 6: MISCELLANEOUS					
N S	1390	<p>NAESB plans to review the existing business functions set forth in the NAESB WEQ standards to determine if changes should be made to address Paragraph 1390 of Order 890.</p> <p>FERC: OATT is sufficient to allow a Transmission Provider to manage situations where the Transmission Customer modifies its application for service to the point that the request is "meaningfully different" than initial request.</p> <p>ESS/ITS: need to review if this has any impact on business functions.</p>	WEQ 2008 Annual Plan Item 2(a)(iv)(1)	<p>FORMAL COMMENT: 4th Quarter, 2009</p> <p>WEQ EC VOTE: 2010</p> <p>RATIFICATION: 2010</p>	Not Started
N	1627	Development of OASIS business practice standards and OASIS S&CPs for "the posting	WEQ 2008	FORMAL COMMENT: 4 th	Not Started

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Granic	Cite	Order 890 Work Plan			
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S		<p>of additional curtailment information on OASIS” via a “detailed template for the posting of additional information on OASIS regarding firm transmission curtailments.</p> <p>Posting of curtailment information on OASIS: develop a detailed template for the posting of additional information on OASIS regarding firm transmission curtailments.</p> <p>Order 890-A:</p> <p>973. The Commission did not propose in the NOPR, or adopt in Order No. 890, any changes to the terms and conditions under which a transmission provider may curtail service to maintain reliable operation of the grid, as set forth in sections 13.6 and 14.7 for point-to-point service and section 33 for network service. The Commission did, however, conclude that the posting of additional curtailment information is necessary to provide transparency and allow customers to determine whether they have been treated in the same manner as other transmission system users, including customers of the transmission provider. Accordingly, the Commission required transmission providers, working through NAESB, to develop a detailed template for the posting of additional information on OASIS regarding firm transmission curtailments, including all circumstances and events contributing to the need for a firm service curtailment, specific services and customers curtailed (including the transmission provider’s own retail loads), and the duration of the curtailment.</p>	Annual Plan Item 2(a)(iv)(2)	<p>Quarter, 2009</p> <p>WEQ EC VOTE: 2010</p> <p>RATIFICATION: 2010</p>	
	1005	<p>Redispatch Cost Posting: Business practices for redispatch cost postings:</p> <p>The business practice standards for redispatch cost postings will include OASIS business practices and any needed additions or revisions to the OASIS Standards & Communication Protocols (S&CPs) to allow for posting of third party offers of planning redispatch services. The business practice standards developed for redispatch cost postings may affect the existing NAESB business practice standards for Transmission Loading Relief. (moved from Group 2)</p> <p>Order 890-A:</p> <p>568. Transmission providers also were directed to work with customers to facilitate the use of third party generation, where available, in provision of planning redispatch. To facilitate provision of redispatch service by third parties, the Commission further directed transmission providers, working through NAESB, to modify their OASIS sites and develop any necessary business practices to allow for posting of third party offers to provide planning redispatch. Again, transmission providers were not required to implement the new OASIS functionality and any related business practices until NAESB</p>	WEQ 2008 Annual Plan Item 2(a)(iv)(3)	<p>FORMAL COMMENT: 4th Quarter, 2009</p> <p>WEQ EC VOTE: 2010</p> <p>RATIFICATION: 2010</p>	Not Started

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		<p>develops appropriate standards.</p> <p>Order 890-B:</p> <p>131. In Order No. 890, the Commission directed transmission providers to modify their OASIS sites to allow for posting of third-party offers for planning redispatch and to work with NAESB to develop the OASIS functionality and any necessary business practice standards to allow for third-party planning redispatch. The Commission noted that provision of third party planning redispatch required coordination between the customer, transmission provider and reliability coordinator, but determined that the customer bears the burden to ensure that the necessary contractual and technical arrangements are in place to maintain reliability.</p>			
□	243-244	<p>Posting of ETC: OASIS business practice standards and S&CPs necessary to implement the Business Practice Standards developed to complement NERC Reliability Standards for Existing Transmission Commitment (ETC) to create a “consistent approach for determining the amount of transfer capability a transmission provider may set aside for its native load and other committed uses”, including the elements of ETC for full implementation of the NERC MOD-001 reliability standard. (moved from Group 1)*</p> <p>*Requirements for a “consistent approach for determining the amount of transfer capability a transmission provider may set aside for its native load and other committed uses” is assigned to BPS/ESS/ITS (see above BPS/ESS/ITS item that references WEQ 2008 AP Items 2(b)(ii)(2)).</p>	WEQ 2008 Annual Plan Item 2(a)(vi)(4) and 2(a)(iv)(4)	<p>FORMAL COMMENT: 2nd Quarter, 2008</p> <p>WEQ EC VOTE: 3rd Quarter, 2008</p> <p>RATIFICATION: 3rd Quarter, 2008</p>	<p>Started May 15, 2008. Task has been reassigned to BPS/ESS/ITS.</p> <p>Recommendation was voted out of subcommittee on June 17, 2008.</p> <p>Formal comment period closes on July 21, 2008.</p> <p>Approved by WEQ EC August 19, 2008.</p> <p>Ratified by the membership on 9/22/2008.</p>

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GROUP 7: Tagging for Conditional Firm Service, Submittal Windows					
	Order 890-A, paragraph 592	<p>Tagging for CFS: Within 180 days of Order 890-A publication, develop tracking capabilities and business practices for tagging for implementation of conditional firm service.</p> <p>Order 890-A:</p> <p>592. We agree with petitioners that the NAESB rules regarding tagging do not allow a transmission provider to change the tag of a transmission customer. That is why, in Order No. 890, the Commission directed transmission providers to coordinate with other transmission providers in their regions to develop their own business practices to implement the tagging and tracking of conditional firm service. Upon consideration of petitioners' concerns, we grant rehearing to require transmission providers, in coordination with NERC and NAESB, to develop within 180 days of publication of this order in the Federal Register a consistent set of tracking capabilities and business practices for tagging for implementation of conditional firm service. We agree with petitioners that a consistent set of practices followed by the industry will reduce transmission provider discretion and bring uniformity in implementing conditional firm service. In the interim, the existing business practices of each transmission provider for tracking and tagging conditional firm service shall remain in effect.</p>	WEQ 2008 Annual Plan Item 2(a)(vii)(1)	<p>FORMAL COMMENT: 3rd Quarter 2008</p> <p>WEQ EC VOTE: 3rd Quarter 2008</p> <p>RATIFICATION: 3rd Quarter 2008</p>	<p>Assigned to the ESS/ITS.</p> <p>Order 890-A publications date: January 16, 2008.</p> <p>On April 4, 2008, the ESS/ITS voted to send this recommendation out for informal comments due April 11, 2008.</p> <p>Recommendation posted for 30-day formal comment period on June 25th.</p> <p>Approved by WEQ EC on August 8, 2008.</p> <p>Ratified by the membership on 9/25/2008.</p>
N S	Order 890-A, paragraph 805	<p>Submittal Windows: Standardized practices for allocating capacity among requests received during a submittal window.</p> <p>Order 890-A:</p> <p>805. The Commission recognizes that developing methods to allocate capacity among requests received during a submittal window may require detailed procedures, particularly when transmission requests received simultaneously exceed available capacity. As the Commission explained in Order No. 890, however, we believe that each transmission provider is in the best position to develop allocation procedures that are suitable for its system. This does not preclude transmission providers from working through NAESB to develop standardized practices, as suggested by Southern. For example, as we pointed out in Order No. 890, allocation methods such as that used by PJM to allocate monthly firm point-to-point transmission service could provide useful guidance in developing general allocation procedures.</p>	WEQ 2008 Annual Plan Provisional Item 7	<p>FORMAL COMMENT:</p> <p>WEQ EC VOTE:</p> <p>RATIFICATION:</p>	No date assigned for completion.

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Item Description	Completion ¹	Assignment ²
1 Develop business practices standards as needed to complement reliability standards		
Develop business practice standards to support and complement NERC reliability standards, NERC policies and NERC standards authorization requests (SARs) using the NERC/NAESB Coordination Joint Standards Development Process as appropriate. Current NAESB activities underway to develop business practice standards that are supportive of this annual plan item are:		
a) Make version 2 changes to business practices as requested.		
i) Make changes to business practices as related to inclusion of the NERC Reliability Functional Model functional model entities as NERC undertakes the same efforts. Status: No requests	As requested	BPS
ii) Continuous support of TLR Procedure in alignment with NERC efforts on TLR Phase II and Phase III which would be included in version 2 development. ³ Status: Complete The “Continuous Support of TLR Procedure in Alignment with NERC Efforts on Phase II and Phase III” recommendation was approved by the BPS to post for the formal comment period. For 2009 specific items for TLR coordination with NERC will be added as needed.	3 rd Q, 2008	BPS ⁴
b) Develop business practices to support Coordinate Interchange – R05020 “Include a guideline for rounding schedules with partial mWh’s in the coordinate interchange business practice WEQ BPS-002-000” Status: Underway	3 rd Q, 2009	JISWG
c) Operate Within Limits (R03017) as coordinated with the NERC schedule on the same development for reliability standards		
i) Review the need to develop business practice standards to support Operate Within Limits (R03017) Status: Completed	1 st Q, 2008	SRS
ii) Develop business practice standards to support Operate Within Limits (R03017) Status: Completed No standards are needed at this time	2 nd Q, 2008	BPS
d) Prepare recommendations for future path for TLR in concert with NERC, which may include alternative congestion management procedures ⁵ Status: Underway	2009	BPS ⁶

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Item Description	Completion	Assignment
<p>e) Conduct analysis as to whether standards can be developed which outline a standardized process for the coordination and execution of emergency energy schedules. These would be complementary standards to EOP-002-2 Requirements R4 and R6 (SRS Analysis of EOP-002-2 R4 & R6)</p> <p>Status: Not Started</p>	1 st Q, 2009	JISWG
<p>f) Review Market System Back-Up existing language and review of existing back-up language</p> <p>Status: Completed</p> <p>Per the guidance from the WEQ Executive Committee after presenting the Request for Executive Committee Guidance on WEQ 2008 Provisional Item 5 the SRS developed and approved a “no action” recommendation to close out this annual plan item</p>	4 th Q, 2008	SRS
<p>g) Provide complementary business practice standards to support Coordinate Operations Standards Authorization Request assigned to NERC (R03014)</p> <p>Status: Completed</p> <p>Based on the SRS review of related documents and EC updates to the WEQ Annual Plan in May 2004 where R03014 was noted as completed the SRS approved a “no action” recommendation to close out this standards request.</p>	3 rd Q, 2008	SRS
<p>2 Develop business practice standards in support of the FERC RM05-25-000 and RM05-17-000 (OATT Reform)</p>		
<p>a) Develop version 2 business practice standards to better coordinate the use of the transmission system among neighboring transmission providers. Such business practice standards would be based on recommendations from NERC's Long Term ATC/AFC Task Force and would involve revised procedures for the ATC calculation and/or revised protocols as determined by the final order.</p> <p>Status: Underway</p> <p>Development is using joint standards development process with NERC. Request R050004 was expanded to include the Order No. 890 (Docket Nos. RM05-25-000 and RM05-17-000) and Order No. 890-A (Docket Nos. RM05-17-001, 002, and RM05-25-001, 002), “Preventing Undue Discrimination and Preference in Transmission Services”, issued April 11, 2007).</p>		
<p>i) Group 1: Conditional Firm, Annotations For ATC; Load Forecast And Actual Load; Re-Bid Of Partial Service; And Preconfirmation Priority</p> <p>1. Conditional Firm, Annotations For ATC; Load Forecast And Actual Load; Re-Bid Of Partial Service; And Preconfirmation Priority S&CP Requirements</p> <p>Status: Completed</p> <p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	4 th Q, 2007	ESS/ITS

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	Item Description	Completion	Assignment
2.	<p>Conditional Firm Business Practice Standards associated with S&CP Requirements completed in 2(a)(i)(1)</p> <p>Status: Completed</p> <p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	3 rd Q, 2008	ESS/ITS
3.	<p>Annotations For ATC Business Practice Standards associated with S&CP Requirements completed in 2(a)(i)(1)</p> <p>Status: Completed</p> <p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	1 st Q, 2008	BPS, ESS/ITS
4.	<p>Load Forecast And Actual Load Business Practice Standards associated with S&CP Requirements completed in 2(a)(i)(1)</p> <p>Status: Completed</p> <p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	1 st Q, 2008	BPS, ESS/ITS
5.	<p>Re-Bid Of Partial Service Business Practice Standards on a Single Transmission Provider's System associated with S&CP Requirements completed in 2(a)(i)(1)</p> <p>Status: Completed</p> <p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	1 st Q, 2008	ESS/ITS
6.	<p>Preconfirmation Priority Business Practice Standards associated with S&CP Requirements completed in 2(a)(i)(1)</p> <p>Status: Completed</p> <p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	1 st Q, 2008	ESS/ITS
7.	<p>OASIS Exemptions Appendix</p> <p>Status: Completed</p> <p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	4 th Q, 2007	ESS/ITS
ii)	Group 2: Metrics; Redispatch Cost Posting		
1.	<p>Metrics Related to Provision of Transmission Service (Paragraph 413 of Order 890)</p> <p>Status: Completed</p> <p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	1 st Q, 2008	ESS/ITS

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	Item Description	Completion	Assignment
2.	<p>Metrics Related to Performance of Transmission Studies (Paragraphs 1308 through 1317 of Order 890)</p> <p>Status: Completed</p> <p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	1 st Q, 2008	ESS/ITS
3.	<p>Redispatch Cost Posting</p> <ul style="list-style-type: none"> • Monthly average cost of redispatch • A high and low redispatch for the month <p>Status: Completed</p> <p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	1 st Q, 2008	ESS/ITS
iii)	Group 3: Network Service On OASIS		
1.	<p>Use of OASIS to Make Electronic Requests to Designate and Terminate Network Resource</p> <p>Status: Underway</p>	1 st Q, 2009	ESS/ITS
2.	<p>Ability to Query Requests to Designate and Terminate Network Resources and Allow for Queries of All Information Provided with Designation Requests</p> <p>Status: Underway</p>	1 st Q, 2009	ESS/ITS
3.	<p>Masking of Designated Network Resource Operating Restrictions and Generating Cost Information</p> <p>Status: Underway</p>	1 st Q, 2009	ESS/ITS
4.	<p>Procedural Requirements for Submitting Designations over new OASIS Functionality</p> <p>Status: Underway</p>	1 st Q, 2009	ESS/ITS
5.	<p>Specify How Designated Network Service Informational Postings are Posted on OASIS</p> <p>Status: Underway</p>	1 st Q, 2009	ESS/ITS
6.	<p>Set Forth the Treatment of OASIS Requests when the Customer Fails to Provide the Necessary Attestation</p> <p>Status: Underway</p>	1 st Q, 2009	ESS/ITS
7.	<p>Procedural Requirements for Submitting Both Temporary and Indefinite Terminations of Network Resources</p> <p>Status: Underway</p>	1 st Q, 2009	ESS/ITS

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	Item Description	Completion	Assignment
	8. Procedures for Submitting and Processing Requests for Concomitant Evaluations of Transmission Requests and Temporary Terminations Status: Underway	1 st Q, 2009	ESS/ITS
iv)	Group 4: Pre-Emption; Request No. R05019; and Revisions to Standard 9.7		
	1. Pre-Emption Status: Not Started	2 nd Q, 2009	ESS/ITS
	2. Request No. R05019 Status: Not Started	2 nd Q, 2009	ESS/ITS
	3. Revisions to Standard 9.7 Status: Underway This item also addresses work in 2006 WEQ AP 3a(x).	2009	EC Task Force
	4. Posting of Existing Transmission Commitments (ETC) (moved from Group 1) Status: Completed Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.	2 nd Q, 2008	BPS, ESS/ITS
v)	Group 5: Paragraph 1377		
	1. Paragraph 1377 Status: Not Started	2 nd Q, 2009	ESS/ITS
	2. Re-Bid Of Partial Service across Multiple Transmission Providers' Systems Status: Not Started	2 nd Q, 2009	ESS/ITS
vi)	Group 6: Miscellaneous (Paragraphs 1390 and 1627 of Order 890)		
	1. Paragraph 1390 of Order 890 Status: Not Started	2 nd Q, 2009	ESS/ITS
	2. Paragraphs 1627 of Order 890 Status: Not Started	2 nd Q, 2009	ESS/ITS
	3. Redispatch Cost Posting to allow for posting of third party offers of planning redispatch services. Status: Not Started	2 nd Q, 2009	ESS/ITS

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Item Description	Completion	Assignment
<p>4. Posting of Existing Transmission Commitments (ETC) (moved from Group 1)</p> <p>Status: Completed</p> <p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	2 nd Q, 2008	ESS/ITS
vii) Group 7: Tagging for Conditional Firm Service		
<p>1. Tagging for Conditional Firm Service</p> <p>Status: Completed</p> <p>Published Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	2 nd Q, 2008	ESS/ITS
b) Develop the needed business practices as companion to the NERC standards for ATC related efforts. ⁷		
i) Develop standards to support existing Request No. R05004 .		
<p>1. The processing of transmission service requests, which use TTC/ATC/AFC, in coordination with NERC changes to MOD 001 where the allocation of flowgate capability based on historical Network Native Load impacts the evaluation of transmission service requests, requiring the posting of those allocation values in conjunction with queries of service offerings on OASIS</p> <p>Status: Underway</p>	1 st Q, 2009	ESS/ITS
<p>2. Remaining requirements documented in R05004 and R05004A.</p> <p>Status: Completed</p>	3 rd Q, 2008	BPS, ESS/ITS
ii) Develop Business Practice Standards for Existing Transmission Commitments (ETC)		
<p>1. Develop the Business Practice Standards complementary to NERC Reliability Standards for Existing Transmission Commitments (ETC) to create a “consistent approach for determining the amount of transfer capability a transmission provider may set aside for its native load and other committed uses”, including the elements of ETC for full implementation of the NERC MOD-001 reliability standard.</p> <p>The business practices developed to address this item will require to coordination with the NERC Order 890 reliability standards development.</p> <p>Status: Completed</p> <p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	2 nd Q, 2008	BPS, ESS/ITS

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Item Description	Completion	Assignment
<p>2. Business practice standards for accounting for counterflows. These standards will be included in the ATC business practice standards.</p> <p>The business practices developed to address this item will require to coordination with the NERC Order 890 reliability standards development.</p> <p>Status: Completed</p> <p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	June 1, 2008	BPS ESS/ITS
<p>iii) Capacity Benefit Margin (CBM) Business Practices</p>		
<p>1. Determine if business practice standards are needed, and if so, develop them to set forth “how the CBM value shall be determined, allocated across transmission paths, and used” and how transmission providers will “reflect the set-aside of transfer capability as CBM in the development of the rate for point-to-point transmission service.”</p> <p>The business practices developed to address this item will require to coordination with the NERC Order 890 reliability standards development.</p> <p>Status: Completed</p> <p>The NAESB subcommittees have determined the CBM requirements have been documented in the NERC MOD-004 to address this item, so no further action is required by NAESB. Please note that when the related NERC reliability standards are adopted, the subcommittee leadership will review to determine if additional action by NAESB is needed.</p>	3 rd Q, 2008	BPS, ESS/ITS
<p>2. Business practice standards that include an OASIS mechanism to “allow for auditing of CBM usage.”</p> <p>The business practices developed to address this item will require to coordination with the NERC Order 890 reliability standards development.</p> <p>Status: Completed</p>	3 rd Q, 2008	BPS, ESS/ITS
<p>3. Any additional business practice standards needed to complement the NERC CBM reliability standards (MOD004) created as a result of this effort.</p> <p>The business practices developed to address this item will require to coordination with the NERC Order 890 reliability standards development.</p> <p>Status: Completed</p>	3 rd Q, 2008	BPS, ESS/ITS

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Item Description	Completion	Assignment
iv) Transmission Reliability Margin Business Practices:		
1. Transmission Reliability Margin (TRM): Business Practice Standards to complement the NERC reliability standards for TRM. The business practices developed to address this item will require to coordination with the NERC Order 890 reliability standards development. Status: Completed The NAESB subcommittees have determined TRM requirements have been documented in previously submitted recommendations, so no further action is required by NAESB.	April 8, 2008	BPS, ESS/ITS
2. The business practice standards will include specification of the appropriate uses of TRM and when transmission providers may set aside TRM. The business practices developed to address this item will require to coordination with the NERC Order 890 reliability standards development Status: Completed The NAESB subcommittees have determined TRM requirements have been documented in previously submitted recommendations, so no further action is required by NAESB.	April 8, 2008	BPS, ESS/ITS
3. Any additional business practice standards needed to complement the NERC TRM reliability standards (MOD008) created as a result of this effort. The business practices developed to address this item will require to coordination with the NERC Order 890 reliability standards development. Status: Completed The NAESB subcommittees have determined TRM requirements have been documented in previously submitted recommendations, so no further action is required by NAESB.	April 8, 2008	BPS, ESS/ITS

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Item Description	Completion	Assignment
<p>v) Business Practice Standards for ATC and AFC Calculation Methodologies to complement the NERC reliability standards created for ATC and AFC Methodologies (NERC MOD001 (Available Transfer Capability); NERC MOD028 (Network Response Available Transfer Capability); NERC MOD029 (Rated System Path Available Transfer Capability); and NERC MOD030 (Flowgate Network Response Available Transfer Capability)):</p>		
<p>1. Business practice standards to address the frequency and posting requirements for all ATC components that are complementary to the related NERC reliability standards.</p>	<p>April 23, 2008</p>	<p>BPS/ESS/ITS</p>
<p>The business practices developed to address this item will require to coordination with the NERC Order 890 reliability standards development.</p>		
<p>Status: Completed</p>		
<p>The subcommittee determined no additional standards are required from what is already documented in the "ATC Information Link (2008 Annual Plan 2.b.vii)" recommendation and what is required for ATC postings under the previously ratified recommendation "Modifications to WEQ-001 to comply with modifications to 18 C.F.R. 37.6 and 37.7 within Order 890 with Minor Corrections applied on February 27, 2008."</p>		
<p>2. Business practice standards for data exchange for ATC modeling complementary to the related NERC reliability standards including any OASIS posting requirements to achieve the data exchange.</p>	<p>1st Q, 2008</p>	<p>BPS/ESS/ITS</p>
<p>The business practices developed to address this item will require to coordination with the NERC Order 890 reliability standards development.</p>		
<p>Status: Completed</p>		
<p>The NAESB subcommittees have determined the data exchange requirements have already been documented in the NERC standards, so no further action is required by NAESB.</p>		
<p>3. Business practice standards that will set forth how transmission providers will post "explanations of the reason for a change in monthly and yearly ATC values on a constrained path." The standards will include a requirement that the transmission provider posts the reason for the change in a narrative form. The posted information will include "the (1) specific events which gave rise to the change and (2) new values for ATC on that path (as opposed to all points on the network)."</p>	<p>1st Q, 2008</p>	<p>BPS/ESS/ITS</p>
<p>The business practices developed to address this item will <u>not</u> require to coordination with the NERC Order 890 reliability standards development.</p>		
<p>Status: Completed</p>		
<p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>		

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	Item Description	Completion	Assignment
	<p>4. Business practice standards for posting on OASIS of the “underlying load forecast assumptions for all ATC calculations”.</p> <p>The business practices developed to address this item will <u>not</u> require to coordination with the NERC Order 890 reliability standards development</p> <p>Status: Completed</p> <p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	1 st Q, 2008	BPS/ESS/ITS
	<p>5. Business practice standards for posting on OASIS of the “actual daily peak load for the prior day.”</p> <p>The business practices developed to address this item will <u>not</u> require to coordination with the NERC Order 890 reliability standards development</p> <p>Status: Completed</p> <p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	1 st Q, 2008	BPS/ESS/ITS
vi)	<p>Business practice standards to complement NERC reliability standards for Transfer Capability in response to new NERC Supplemental SAR: Revisions to Existing Standards MOD001-MOD009, FAC12-13</p> <p>This item was added as a result of the Supplemental SAR NERC created in case additional business practices are needed as a result of the work on this SAR by NERC. It does not have a cite in Order 890. This item will require coordination with the NERC Order 890 reliability standards development.</p> <p>Status: Completed</p>	May 1, 2008	BPS, ESS/ITS
vii)	<p>Business practice standards to set forth the procedure for input on TTC and ATC methodologies and values. (During the Order 890 NERC and NAESB joint standards development effort, it was determined that the standards contained in MOD003 should be business practice standards instead of reliability standards. NERC has requested that NAESB adopt the standards as business practices via correspondence to Ms. McQuade, NAESB President.)</p> <p>This item will require coordination with the NERC Order 890 reliability standards development because the language to address this item is contained within a draft standards that addresses items that are dependent on NERC deliverables, i.e., the requirements to create an “ATC Information Link” on OASIS. There is no Order 890 cite for this item.</p> <p>Status: Completed</p> <p>Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	1 st Q, 2008	BPS, ESS/ITS

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Item Description	Completion	Assignment
<p>c) Develop version 1 business practice standards to support transparency reporting and related functions that may be required as a result of the final order.</p> <p>Status: Completed</p> <p>The Executive Committee did not approve the recommendation submitted by the EC Task Force. Instead, they approved a “No Action” Recommendation for this annual plan item at their October 6, 2008 meeting</p>	3 rd Q 2008	EC Task Force
<p>3 Develop business practices standards to improve the current operation of the wholesale electric market and develop and maintain business practice and communication standards for OASIS and Electronic Scheduling</p>		
<p>a) Develop and/or maintain business practice standards as needed for OASIS and electronic scheduling. Specific items to address include:</p>		
<p>i) Develop OASIS S&CP changes to support OASIS business practices.</p> <p>Status: Completed</p> <p>Dependent on development of OASIS business practices</p>	3 rd Q 2008	ESS/ITS
<p>ii) Network Services: Determine and develop needed business practice standards or other support is needed to support use of OASIS for Network Service transactions (R04006E). (Related to AP 2(a)(iii))</p> <p>Status: Underway</p>	1 st Q, 2009	ESS/ITS
<p>iii) Registry (TSIN): Determine and develop needed business practice standards to support the registry functions currently supported by NERC (R04037, R06027).</p> <p>Status: Underway</p>		
<p>1) Work with the NAESB counsel to develop a confidentiality agreement, (R07013)</p>	2009	BPS
<p>2) Transition the TSIN Registry from NERC to NAESB.</p>	2009	NAESB Staff
<p>3) Review and correct the Coordinate interchange Business Practice Standard as noted during the development of the e-Tag 1.8 development process.</p>	3 rd Q, 2009	JISWG
<p>v) Document procedures used to implement the displacement/interruption terms of the Pro Forma tariff (R05019).</p> <p>Status: Not Started</p>	3 rd Q, 2009	ESS/ITS
<p>vi) Make incremental enhancements to OASIS as an outgrowth of the NAESB March 29, 2005 conference on the future of OASIS (R05026).</p> <p>Scoping statement completed by SRS and assignments made to BPS, ESS/ITS and JISWG.</p>		
<p>1) Represent ALL pre-Order 888 (“grandfathered”) transmission and ancillary services in current use in OASIS</p> <p>Status: Completed</p>	3 rd Q, 2008	BPS, ESS/ITS

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	Item Description	Completion	Assignment
2)	Eliminate Masking of TSR tag source and sink when requested status is denied, withdrawn refused, displaced, invalid, declined, annulled or retracted Status: Not Started	3 rd Q, 2009	ESS/ITS
3)	Initiate standard that requires ALL historical transmission service reservations to be available for review up to a number of years in the past. Status: Completed	3 rd Q, 2008	ESS/ITS
4)	Initiate standard that eliminates the disparity of posting “sensitive” information. This standard should also include procedures of user certification that allows access to this class of information. Status: Not Started	2009	ESS/ITS
5)	Enhance the TSR result postings to allow showing of (i) limiting transmission elements and (ii) available generation dispatch options that would allow acceptance of reservation request. Status: Not Started	2009	ESS/ITS
6)	Standardize the availability of TSR study result postings, eliminating practice of some Transmission Owners that charge for viewing these documents. Status: Completed This item was completed with Recommendation (2008 AP Item 2.a.i.5, 2008 AP Item 2.a.i.6, and 2008 AP Items 2.a.ii.1-3) WEQ-001 Changes for Rebid of Partial Service, Preconfirmation Priority, and Group 2: Metrics; Redispatch Cost Posting.	1 st Q, 2008	ESS/ITS
vii)	Respond to issues in FERC Order No. 676 (Docket No. RM05-5-000) – NAESB WEQ Standards 001 9.7, (paragraph 51 of the order). Status: Underway Item was assigned to group 4, reference 2007 WEQ AP item 2(a)(iv)(3).	2009	EC Task Force
b)	Develop and/or maintain standard communication protocols and cyber-security business practices as needed.		
i)	Address the surety assessment findings on NAESB PKI standards. Status: Completed Item will be provided as a response to the U.S. DoE upon completion by the WGQ for their response to the findings.	1 st Q, 2008	JISWG
ii)	Develop PKI standards for OASIS. Status: Not Started	2009	ESS/ITS

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	Item Description	Completion	Assignment
iii)	Develop PKI Standards for e-tagging (Develop Implementation Plan). Status: Underway eTagging items are linked to the transition of the Registry from NERC to NAESB.	2 nd Q 2009	JISWG
iv)	Develop enhanced Electric Industry Registry (EIR), (R06027) Status: Underway	2009	NAESB Staff
c)	Develop needed business practice standards for organization/company codes for NAESB standards – and address current issues on the use of DUNs numbers. Status: Underway Common code usage is linked to the transition of the Registry from NERC to NAESB.	2009	NAESB Staff with WEQ support
d)	Develop business practice standards in support of FERC Order 717 Status: Not Started	2 nd Q, 2009	ESS/ITS
4	Review and develop business practices standards to support e-Tariff program		
	Develop business practices as needed to support the e-Tariff program including submittal of tariffs and metadata. (Docket No RM05-1-000) Status: Completed Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.	1 st Q, 2008	Joint WEQ/WGQ e-Tariff Subcommittee
5	Review and develop business practices standards to Demand Response, Demand Side Management and Energy Efficiency Programs		
	Review and develop needed model business practices for a standardized method for quantifying benefits, savings, cost avoidance and/or the reduction in energy demand and usage derived from the implementation of demand side management and energy efficiency programs. This effort will include demand side response, energy efficiency programs and metering, including the 'curtailment service provider' program.		
a)	Develop matrix and business practice standards for measurement and verification for demand response programs in ISO/RTO footprint areas. Status: Completed	4 th Q, 2008	Joint WEQ/Retail DSM-EE Subcommittee
b)	Develop matrix and business practice standards for measurement and verification for demand response programs in non-ISO/RTO footprint areas. Status: Underway	TBD	Joint WEQ/Retail DSM-EE Subcommittee
c)	Develop preamble for business practice standards for measurement and verification for demand response and energy efficiency programs. Status: Underway	2009	Joint WEQ/Retail DSM-EE Subcommittee

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Item Description	Completion	Assignment
d) Develop glossary for business practice standards Status: Underway	2009	Joint WEQ/Retail DSM-EE Subcommittee
e) Support retail development of matrix and model business practice standards for measurement and verification for demand response programs Status: Underway	2009	Joint WEQ/Retail DSM-EE Subcommittee
f) Develop business practice standards to measure and verify energy reductions that are made to comply with a Renewable Portfolio Standard that included energy efficiency or a stand-alone Energy Efficiency Portfolio Standard. Status: Not Started	Phase 2	Joint WEQ/Retail DSM-EE Subcommittee
g) Develop business practice standards to factor Demand Control and Energy Efficiency programs into reliability / supply decisions at the wholesale level for generation and transmission planning and operations. Status: Not Started	Phase 2	Joint WEQ/Retail DSM-EE Subcommittee
h) Develop business practice standards for cap and trade programs for green house gas Status: Not Started	Phase 2	Joint WEQ/Retail DSM-EE Subcommittee
6 Maintain existing body of Version 1 standards		
a) Review/revise WEQ 006 to remove/revise mandatory requirements for Interconnection Time Monitor (R07019) Status: Completed Published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.	2 nd Q, 2008	BPS
b) Develop a NAESB time and inadvertent management business practice that provides additional inadvertent payback options and improved time control (R07020) Status: Complete	3 rd Q, 2008	BPS
c) Make consistency changes to Version 1.0 standards as directed by the WEQ Leadership Committee on December 12, 2007 (R08001 – BPS, ESS/ITS, R08002 - ESS/ITS, R08003 - ESS/ITS - BPS, R08004, R08005 - ESS/ITS)		
1) OASIS Consistency Changes (R08001, R08002, R08003, R08005) Status: Not Started	2009	ESS/ITS
2) Gas / Electric Communication Consistency Changes (R08004) Status: Underway	2009	BPS

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	Item Description	Completion	Assignment
d)	<p>Modify WEQ-001 to reflect in the definition of certain ancillary services that such ancillary services may be provided by non-generation resources such as demand resources. (http://www.naesb.org/pdf3/weq_ec051308w2.doc)</p> <p>Status: Completed</p> <p>To be published in Version 002, September 30, 2008 and forwarded to the FERC as part of the Version 002 filing, August 29, 2008.</p>	July 2008	BPS, ESS/ITS
e)	<p>Modify NAESB definitions to address internal inconsistencies and inconsistencies with the NERC glossary, (http://www.naesb.org/pdf3/weq_ec051308w3.doc)</p> <p>Status: Underway</p> <p>Subcommittee co-chairs are developing WEQ-000 Definition of Terms/Acronyms to replace definitions being included in each NAESB Business Practice.</p>	1 st Q, 2009	BPS, SRS, ESS/ITS
f)	<p>Review and evaluate whether to cutoff or put a size limit on the entities for which the standards apply</p> <p>Status: Completed</p> <p>After review of FERC Order 676, the subcommittee determined this annual plan item was outside of NAESB's scope. Waivers for standards based on an entity's size should be addressed by FERC rather than through standards at NAESB.</p>	3 rd Q, 2008	SRS
g)	<p>Investigate and review possible modifications to the WGQ Intraday Nominations, Confirmation Scheduling, and Gas Day standards, including possible standards for coordination of wholesale electric and wholesale gas scheduling. (R03031, R03031 revised, Interim Report, Final Report)</p> <p>Status: Completed</p> <p>The subcommittee reviewed the standards request and documentation developed by the Gas Electric Coordination Task Force and determined no additional work was required. The subcommittee approved a "no action" recommendation to close out this standards request.</p>	3 rd Q, 2008	SRS
h)	<p>Develop standards to allow for registered Market Operators to request changes to the Market Level profile of Implemented Interchange (R06006)</p> <p>Status: Underway</p> <p>This request may be more of a clean-up in nature as it was requested in May 2006 but has not been addressed or presented as completed with the requisite documentation.</p>	1 st Q 2009	JISWG
i)	<p>Modify the timing chart for the Western Interconnection in WEQBPS-006 to an initiation of manual time error at +/-5 seconds. (R06010)</p> <p>Status: Completed</p> <p>The BPS developed a No Action recommendation for this request since the scope of the request had been addressed through a minor correction in 3rd Quarter 2006.</p>	3 rd Q, 2008	BPS

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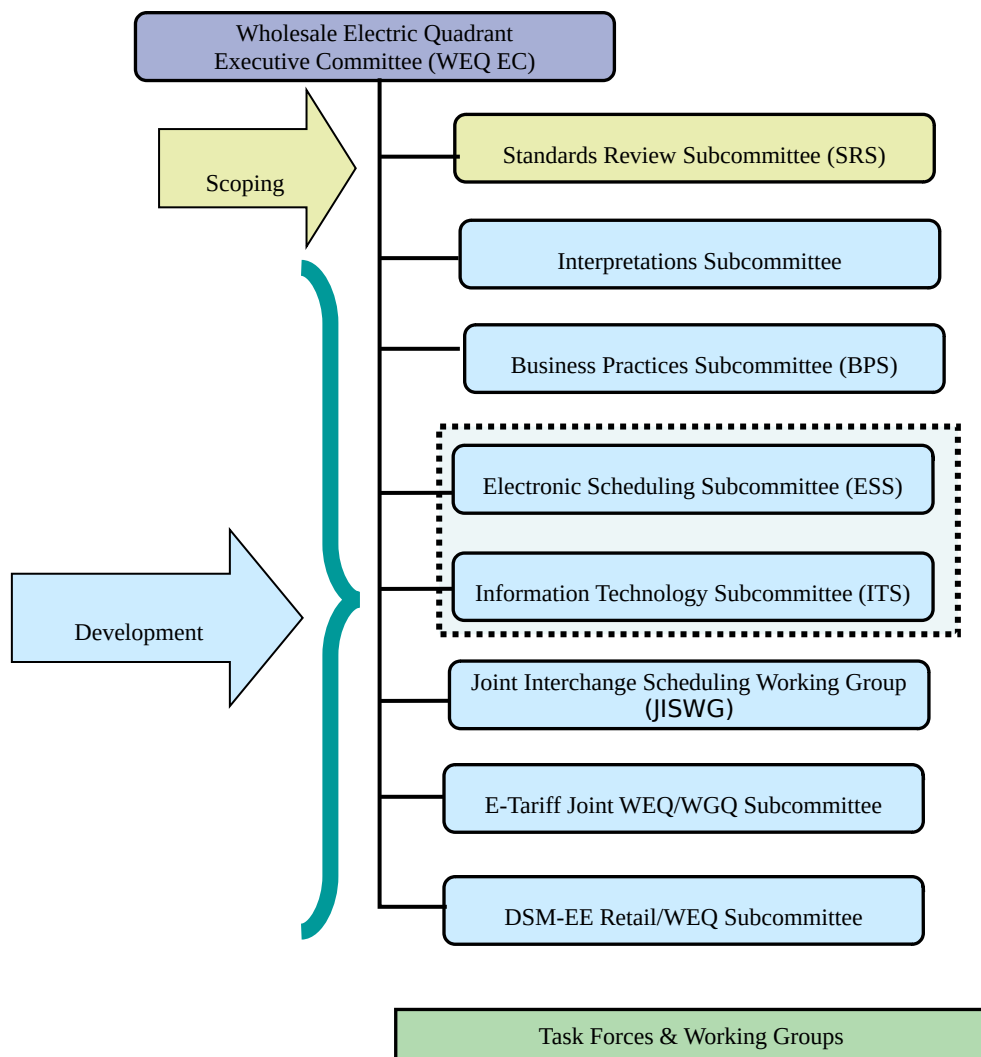
	Item Description	Completion	Assignment
j)	Develop a standard mechanism to implement a “RECALL” of transmission capacity from an existing confirmed transmission service reservation/Specify the technical requirements for implementation of a new OASIS request type, RECALL. (R07001) Status: Completed This request was originally assigned to the ESS/ITS in February 2007.	3 rd Q, 2008	ESS/ITS
k)	Clarify the S&CP implementation of the DEFERRAL request. (R07003) Status: Completed This request was originally assigned to the ESS/ITS in February 2007.	3 rd Q, 2008	ESS/ITS
l)	Develop business practice and technical standards for assigning, tracking, and limiting rollover rights. (R07004) Status: Completed This Standards Request was assigned to the ESS/ITS in February 2007.	3 rd Q, 2008	ESS/ITS
m)	Update the Timing Table to Reflect the Categories (On-time, Late, After-the-fact, and Pre-late) used in the latest E-Tag Specification with respect to receipt of an Arranged Interchange (RFI). (R07007) Status: Completed	4 th Q, 2008	JISWG
n)	Consistent with ¶51 of FERC Order No. 890-A, add AFC and TFC values to the “System_Attribute” data element of the NAESB Standard WEQ-003: OASIS S&CP Data Dictionaries. (R08011) Status: Not Started This Standards Request was assigned to the ESS/ITS in May 2008.	2009	ESS/ITS
o)	Provide for Enhanced Granularity for Public Utilities in Identifying Critical Operational Flow Orders. (R08020) Status: Not Started. This Standards Request was assigned to the BPS in August 2008.	2009	BPS jointly with WGQ BPS

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Item Description	Completion	Assignment
PROVISIONAL ITEMS		
1		
<p>Develop and or modify business practices related to support of NERC effort on the NERC Resources and Transmission Adequacy and Inadvertent Interchange Data Standards BAL-006 revisions.</p>		
<p>Status: In review of the NERC development effort, Balancing Authority Controls (Project 2007-05), with Mr. Akens (TVA, NERC Drafting Team Leader) and Mr. Rodriguez (NERC Manager, Business Practice Coordination), it was determined that no changes would be required to NAESB standards. As such, NAESB leadership is not at this time determining if any development would be undertaken, which would then initiate a joint development effort. A letter to this effect was sent to NERC management. This assessment may however change as the NERC drafting team proceeds further in its development, so the provisional item remains on the 2008 WEQ Annual Plan.</p>		
2		
<p>Develop business practice standards as requested by the regional and state advisory groups.</p>		
3		
<p>Develop business practice standards as related to the Effectiveness Study of Competitive Wholesale Markets (Congressional Mandate), Electric Energy Market Competition Task Force, Docket No. AD05-17-000, issued by the FERC on October 13, 2005.</p>		
4		
<p>Develop and/or maintain business practice standards to support gas-electric interdependencies</p>		
<ul style="list-style-type: none">• Respond to requests as received that are related to Docket No. RM05-28-000.• Respond directives related to the conclusions of the NAESB reports submitted in FERC Order No. 698, Docket Nos. RM05-5-001 and RM96-1-027.		
5		
<p>Develop business practices for allocating capacity among requests received during a submittal window Order 890-A (Docket Nos. RM05-17-001, 002 and RM05-25-001, 002 - Paragraph 805).</p>		
6		
<p>Determine any needed NAESB action in support of the Interchange Distribution Calculator (IDC) and develop any necessary standards.</p>		

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NAESB WEQ EC and Subcommittee Leadership:

Executive Committee: Kathy York (WEQ EC Chair) and Clay Norris (WEQ EC Vice Chair)

Standards Review Subcommittee: Narinder Saini, Ed Skiba

Interpretations Subcommittee: Robert Schwermann

Business Practices Subcommittee & Task Forces: Jim Busbin (TLR), Ed Skiba

Electronic Scheduling Subcommittee/Information Technology Subcommittee & Task Forces: Paul Sorenson, J.T. Wood, Marcie Otondo

Joint Interchange Scheduling Working Group (JISWG): Bob Harshbarger (NAESB), Jim Hansen (NERC)

e-Tariff Joint WEQ/WGQ Subcommittee (e-Tariff): Jane Daly (WEQ), Keith Sappenfield (WGQ)

DSM-EE Joint Retail/WEQ Subcommittee: Ruth Kiselewich and David Koogler (Retail), Roy True and Paul Wattles (WEQ)

Report of the North American Energy Standards Board - Enclosures
Version 002.1 of the NAESB Wholesale Electric Quadrant Standards
Appendix G: 2008 WEQ Annual Plan

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Item Description	Completion ¹	Assignment ²
1 Develop business practices standards as needed to complement reliability standards		
Develop business practice standards to support and complement NERC reliability standards, NERC policies and NERC standards authorization requests (SARs) using the NERC/NAESB Coordination Joint Standards Development Process as appropriate. Current NAESB activities underway to develop business practice standards that are supportive of this annual plan item are:		
a) Develop business practices to support Coordinate Interchange – R05020 “Include a guideline for rounding schedules with partial MWh's in the coordinate interchange business practice WEQ BPS-002-000” the rounding standard recommendation Status: Underway	3 rd Q, 2009	JISWG
b) Continuous support of TLR Procedure in alignment with NERC efforts on TLR Phase II and Phase III development.		
i) Parallel Flow Visualization/Mitigation for Reliability Coordinators in the Eastern Interconnection. Note: Activity is dependent on NERC approval of SAR expected in 2 nd Q, 2009. Upon approval of the SAR and NAESB action on this item, consideration should be given to provisional item 4. Status: Not Started	4 th Q, 2009	BPS
ii) Update WEQ-008 Appendix D to include the Market Flow Threshold Percentage recommended by NERC working group/task force Status: Not Started (dependent on successful field test - expected Oct. 2009) Upon receipt of recommendation, completion date may be adjusted.	4 th Q, 2009	BPS
c) Conduct analysis as to whether standards can be developed which outline a standardized process for the coordination and execution of emergency energy schedules. These would be complementary standards to EOP-002-2 Requirements R4 and R6 (SRS Analysis of EOP-002-2 R4 & R6) Status: Completed and as a result item (3)(a)(viii) has been added to the plan	1 st Q, 2009	JISWG
d) Time Error and Inadvertent (BAL-004 and BAL-006) Coordination with NERC Status: Not Started (Upon initiation of this item by NAESB, a completion date will be determined. The date of 2011 is based on a completion date provided in the NERC BAC project schedule which includes extensive field testing and diverse proposed TIMTF directions to be reconciled in subcommittee meetings.)	2011	TIMTF
e) DCS and AGC (BAL-002 and BAL-005) Coordination with NERC Status Not Started (Upon initiation of this item by NAESB, a completion date will be determined. The date of 2011 is based on a completion date provided in the NERC BAC project schedule which includes extensive field testing and diverse proposed TIMTF directions to be reconciled in subcommittee meetings.)	2011	TIMTF

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Item Description	Completion ¹	Assignment ²
2 Develop business practice standards in support of the FERC RM05-25-000 and RM05-17-000 (OATT Reform)		
a) Develop version 2 business practice standards to better coordinate the use of the transmission system among neighboring transmission providers. Such business practice standards would be based on recommendations from NERC's Long Term ATC/AFC Task Force and would involve revised procedures for the ATC calculation and/or revised protocols as determined by the final order.		
Status: Underway		
Development is using joint standards development process with NERC. Request R050004 was expanded to include the Order No. 890 (Docket Nos. RM05-25-000 and RM05-17-000) and Order No. 890-A (Docket Nos. RM05-17-001, 002 and RM05-25-001, 002) , "Preventing Undue Discrimination and Preference in Transmission Services", issued April 11, 2007).		
i) Group 3: Network Service On OASIS		
1. Use of OASIS to Make Electronic Requests to Designate and Terminate Network Resource	3 rd Q, 2009	ESS/ITS
Status: Underway		
2. Ability to Query Requests to Designate and Terminate Network Resources and Allow for Queries of All Information Provided with Designation Requests	3 rd Q, 2009	ESS/ITS
Status: Underway		
3. Masking of Designated Network Resource Operating Restrictions and Generating Cost Information	3 rd Q, 2009	ESS/ITS
Status: Underway		
4. Procedural Requirements for Submitting Designations over new OASIS Functionality	3 rd Q, 2009	ESS/ITS
Status: Underway		
5. Specify How Designated Network Service Informational Postings are Posted on OASIS	3 rd Q, 2009	ESS/ITS
Status: Underway		
6. Develop standards for the treatment of OASIS Requests when the Customer Fails to Provide the Necessary Attestation	3 rd Q, 2009	ESS/ITS
Status: Underway		
7. Procedural Requirements for Submitting Both Temporary and Indefinite Terminations of Network Resources	3 rd Q, 2009	ESS/ITS
Status: Underway		
8. Procedures for Submitting and Processing Requests for Concomitant Evaluations of Transmission Requests and Temporary Terminations	3 rd Q, 2009	ESS/ITS
Status: Underway		

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	Item Description	Completion¹	Assignment²
ii)	Group 4: Pre-Emption; Request No. R05019; and Revisions to Standard 9.7		
	1. Pre-Emption Status: Not Started	4 th Q, 2009	ESS/ITS
	2. Request No. R05019 Status: Not Started	4 th Q, 2009	ESS/ITS
	3. Modify WEQ-001-9.7 Rollover Rights for Redirect on a Firm Basis Status: Underway	1 st Q, 2009	ESS/ITS
iii)	Group 5: Paragraph 1377		
	1. Paragraph 1377 Status: Not Started	4 th Q, 2009	ESS/ITS
	2. Re-Bid Of Partial Service across Multiple Transmission Providers' Systems Status: Not Started	4 th Q, 2009	ESS/ITS
iv)	Group 6: Miscellaneous (Paragraphs 1390 and 1627 of Order 890)		
	1. Paragraph 1390 of Order 890 Status: Not Started	4 th Q, 2009	ESS/ITS
	2. Paragraphs 1627 of Order 890 Status: Not Started	4 th Q, 2009	ESS/ITS
	3. Redispatch Cost Posting to allow for posting of third party offers of planning redispatch services. Status: Not Started	4 th Q, 2009	ESS/ITS
b)	Develop the needed business practices as companion to the NERC standards for ATC related efforts		
i)	Develop standards to support existing Request No. R05004 .		
	1. The processing of transmission service requests, which use TTC/ATC/AFC, in coordination with NERC changes to MOD 001 where the allocation of flowgate capability based on historical Network Native Load impacts the evaluation of transmission service requests, requiring the posting of those allocation values in conjunction with queries of service offerings on OASIS Status: Underway	3 rd Q, 2009	ESS/ITS
3	Develop business practices standards to improve the current operation of the wholesale electric market and develop and maintain business practice and communication standards for OASIS and Electronic Scheduling		
a)	Develop and/or maintain business practice standards as needed for OASIS and electronic scheduling. Specific items to address include:		

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	Item Description	Completion¹	Assignment²
i)	Network Services: Determine and develop needed business practice standards or other support is needed to support use of OASIS for Network Service transactions (R04006E). (Related to AP 2(a)(iii)) Status: Underway	3 rd Q, 2009	ESS/ITS
ii)	Registry (TSIN): Determine and develop needed business practice standards to support the registry functions currently supported by NERC (R04037 , R06027).		
	1. Work with the NAESB counsel to develop a confidentiality agreement, (R07013) Status: Underway	2 nd Q, 2009	BPS
	2. Transition the TSIN Registry from NERC to NAESB as the enhanced Electric Industry Registry (EIR), (R06027). Status: Underway	4 th Q, 2009	NAESB/ NERC Administration, JISWG
iii)	Document procedures used to implement the displacement/interruption terms of the Pro Forma tariff (R05019). Status: Not Started	4 th Q, 2009	ESS/ITS
iv)	Make remaining incremental enhancements to OASIS as an outgrowth of the NAESB March 29, 2005 conference on the future of OASIS (R05026). Scoping statement completed by SRS and assignments made to BPS and ESS/ITS.		
	1. Eliminate Masking of TSR tag source and sink when requested status is denied, withdrawn refused, displaced, invalid, declined, annulled or retracted Status: Not Started	4 th Q, 2009	ESS/ITS
	2. Initiate standard that eliminates the disparity of posting “sensitive” information. This standard should also include procedures of user certification that allows access to this class of information. Status: Underway (upon further development of this item by NAESB, a completion date will be determined)	2010	ESS/ITS
	3. Enhance the TSR result postings to allow showing of (i) limiting transmission elements and (ii) available generation dispatch options that would allow acceptance of reservation request. Status: Not Started (upon initiation of this item by NAESB, a completion date will be determined)	2010	ESS/ITS
v)	Develop, coordinate inoperability testing, and implement e-Tag version 1.8.1 Status: Underway	4 th Q, 2009	JISWG
vi)	Transition e-Tag Specification and schema to NAESB Status: Underway	1 st Q, 2009	JISWG

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	Item Description	Completion¹	Assignment²
vii)	Review and correct the WEQ-004 Coordinate interchange Business Practice Standard as noted during the development of the e-Tag 1.8 development process. Status: Underway	4 th Q, 2009	JISWG
viii)	Review and correct WEQ-004 Coordinate Interchange Business Practice Standard as needed based on activities in NERC Project 2008-12, Coordinate Interchange Standards Revisions and supporting EOP-002-2 R4 and R6. [note: this is a new item] Status: Not started – dependent on NERC activity (upon initiation of this item by NAESB, a completion date will be determined)	2010	JISWG
b)	Develop and/or maintain standard communication protocols and cyber-security business practices as needed.		
i)	Develop PKI certification program for e-Tag and OASIS Status: Not Started (upon initiation of this item by NAESB, a completion date will be determined)	2009	Board Cert. Prgm Comm
ii)	Develop PKI standards for OASIS. Status: Not Started (upon initiation of this item by NAESB, a completion date will be determined)	2009	ESS/ITS
iii)	Develop PKI Standards for e-tagging (Develop Implementation Plan). Status: Underway (upon further development of this item by NAESB, a completion date will be determined) eTagging items are linked to the transition of the Registry from NERC to NAESB.	2 nd Q, 2009	JISWG
c)	Develop needed business practice standards for organization/company codes for NAESB standards – and address current issues on the use of DUNs numbers. Status: Underway (upon further development of this item by NAESB, a completion date will be determined) Common code usage is linked to the transition of the Registry from NERC to NAESB	2009	NAESB Staff with WEQ support
d)	Develop business practice standards in support of FERC Order No. 717 Status: Not Started (upon initiation of this item by NAESB, a completion date will be determined)	2009	BPS

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	Item Description	Completion ¹	Assignment ²
4	Review and develop business practices standards to Demand Response, Demand Side Management and Energy Efficiency Programs		
	<p>Review and develop needed model business practices for a standardized method for quantifying benefits, savings, cost avoidance and/or the reduction in energy demand and usage derived from the implementation of demand side management and energy efficiency programs. This effort will include demand side response, energy efficiency programs and metering, including the 'curtailment service provider' program.</p>		
	<p>a) Develop matrix and business practice standards for measurement and verification for demand response products and services in ISO/RTO footprint areas. Status: Completed (examples still to be provided)</p>	4 th Q, 2008	WEQ Section of the Joint WEQ/REQ DSM Subcommittee
	<p>b) Develop more detailed technical standards for the measurement and verification of demand response products and services in ISO-RTO footprint areas. Status: Not Started (Scope to be initiated in 2nd Q, 2009, after which a completion date will be set)</p>	Phase 2	WEQ Section of the Joint WEQ/REQ DSM Subcommittee
	<p>c) Develop preamble for business practice standards for measurement and verification for demand response and energy efficiency programs. Status: Underway</p>	3 rd Q, 2009	Joint WEQ/REQ DSM-EE Subcommittee
	<p>d) Develop glossary for business practice standards Status: Underway</p>	3 rd Q, 2009	Joint WEQ/REQ DSM-EE Subcommittee
	<p>e) Support retail development of matrix and model business practice standards for measurement and verification for demand response programs Status: Underway</p>	2 nd Q, 2009	Retail Section of Joint WEQ/REQ DSM-EE Subcommittee
	<p>f) Develop business practice standards to measure and verify energy reductions that are made to comply with a Renewable Portfolio Standard that included energy efficiency or a stand-alone Energy Efficiency Portfolio Standard. Status: Not Started (Scope to be initiated in 2nd Q, 2009, after which a completion date will be set)</p>	Phase 2	WEQ Section/Joint WEQ/REQ DSM-EE Subcommittee

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	Item Description	Completion¹	Assignment²
g)	Develop business practice standards to factor Demand Control and Energy Efficiency programs into reliability / supply decisions at the wholesale level for generation and transmission planning and operations in ISO/RTO footprint areas. Status: Not Started (Scope to be initiated in 2 nd Q, 2009, after which a completion date will be set)	Phase 2	WEQ Section/Joint t WEQ/REQ DSM-EE Subcommittee
h)	Develop business practice standards for cap and trade programs for green house gas Status: Not Started (Scope to be initiated in 2 nd Q, 2009 at the earliest. Upon conclusion of the scoping statement it will be determined whether NAESB standards development is appropriate)	Phase 2	Joint WEQ/REQ DSM-EE Subcommittee
6	Maintain existing body of Version 2 standards		
a)	Make consistency changes to Version 1.0 standards as directed by the WEQ Leadership Committee on December 12, 2007 (R08001 – BPS, ESS/ITS, R08002 - ESS/ITS, R08003 - ESS/ITS - BPS, R08004, R08005 - ESS/ITS)		
	1. OASIS Consistency Changes (R08001, R08002, R08003, R08005) Status: Not Started (upon initiation of this item by NAESB, a completion date will be determined)	2009	ESS/ITS
	2. Gas / Electric Communication Consistency Changes (R08004) Status: Underway	2 nd Q, 2009	BPS
b)	Modify NAESB definitions to address internal inconsistencies and inconsistencies with the NERC glossary. Revise existing NAESB glossary/definition of terms to be applicable to entire set of WEQ Business Practices. (http://www.naesb.org/pdf3/weq_ec051308w3.doc) Status: Underway Subcommittee co-chairs are developing WEQ-000 Definition of Terms/Acronyms to replace definitions being included in each NAESB Business Practice.	2 nd Q, 2009	BPS/ESS/ ITS/SRS Co-chairs
c)	Develop standards to allow for registered Market Operators to request changes to the Market Level profile of Implemented Interchange (R06006) Status: Complete	1 st Q, 2009	JISWG
d)	Consistent with ¶51 of FERC Order No. 890-A, add AFC and TFC values to the “System_Attribute” data element of the NAESB Standard WEQ-003: OASIS S&CP Data Dictionaries. (R08011) Status: Not Started This Standards Request was assigned to the ESS/ITS in May 2008.	3 rd Q, 2009	ESS/ITS
e)	Provide for Enhanced Granularity for Public Utilities in Identifying Critical Operational Flow Orders. (R08020) Status: Not Started. This Standards Request was assigned to the BPS in August 2008 (upon initiation of this item by NAESB, a completion date will be determined)	2009	BPS jointly with WGQ BPS

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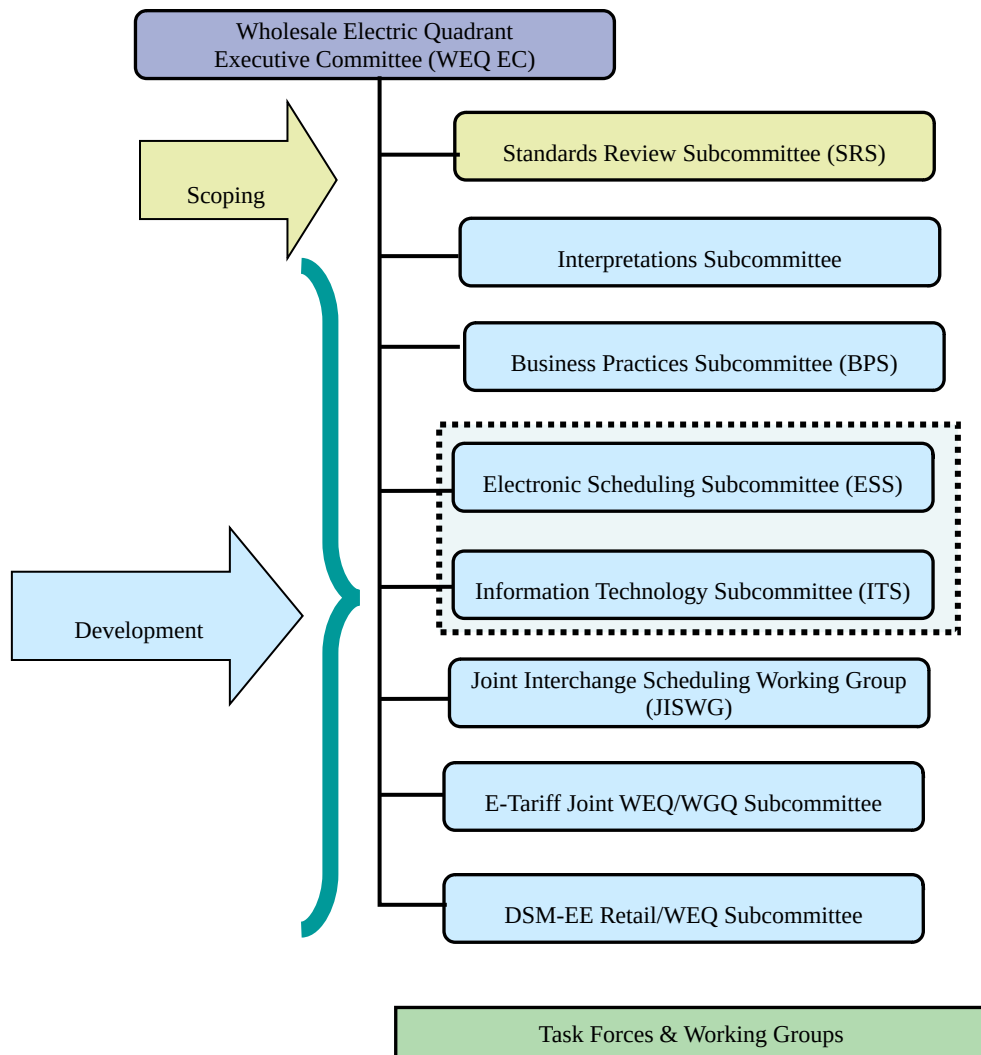
	Item Description	Completion¹	Assignment²
f)	<p>Synchronize Bidding Credit Requirements for FTR, TCC and CRR (R08025) Posting of collateral is an important issue for financial marketers. Most financial marketers and smaller entities are required to post cash for FTR transactions, while most utilities post unsecured credit. Therefore, the timing for posting collateral is especially crucial to financial marketers. There are two posting periods for FTRs:</p> <p>1. The Bidding Requirement: Credit must be posted with FTR bids and these monies are held until bids are cleared.</p> <p>2. The Holding Requirement: After bids are cleared and FTRs awarded, collateral is required for the amount of time the FTR is active.</p> <p>Status: Not Started (upon initiation of this item by NAESB, a completion date will be determined)</p>	2009	SRS (Scoping)

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PROVISIONAL ITEMS

- 1 Develop and or modify business practices related to support of NERC effort on the NERC Resources and Transmission Adequacy (Project 2009-05 Resource Adequacy Assessment).
- 2 Develop business practices for allocating capacity among requests received during a submittal window Order 890-A ([Docket Nos. RM05-17-001, 002 and RM05-25-001, 002](#) - Paragraph 805).
- 3 Determine any needed NAESB action in support of the Interchange Distribution Calculator (IDC) and develop any necessary standards.
- 4 Prepare recommendations for future path for TLR (equity concerns) in concert with NERC, which may include alternative congestion management procedures³. Work on this activity is dependent on completing 2009 WEQ Annual Plan 1.c.i (Parallel Flow Visualization/Mitigation for Reliability Coordinators in the Eastern Interconnection).
- 5 Develop complementary standards that align with NERC Project 2008-01 Voltage and Reactive Control, for which a white paper is expected after the 2009 SAR is processed.

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NAESB WEQ EC and Subcommittee Leadership:

Executive Committee: Kathy York (WEQ EC Chair) and Matthew Goldberg (WEQ EC Vice Chair)

Standards Review Subcommittee: Narinder Saini, Ed Skiba

Interpretations Subcommittee: Robert Schwermann

Business Practices Subcommittee & Task Forces: Jim Busbin (TLR), Ed Skiba

Electronic Scheduling Subcommittee/Information Technology Subcommittee & Task Forces: Paul Sorenson, J.T. Wood, Marcie Otondo

Joint Interchange Scheduling Working Group (JISWG): Bob Harshbarger (NAESB), Jim Hansen (NERC)

e-Tariff Joint WEQ/WGQ Subcommittee (e-Tariff): Jane Daly (WEQ), Keith Sappenfield (WGQ)

DSM-EE Joint Retail/WEQ Subcommittee: Ruth Kiselewich and David Koogler (Retail), Roy True and Paul Wattles (WEQ)

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End Notes WEQ 2009 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.

² The assignments are abbreviated. The abbreviations and committee structure can be found at the end of the annual plan document.

³ For additional information, please see comments submitted by PJM and MISO for this Annual Plan Item:
http://www.naesb.org/pdf3/weq_aplan102907w1.pdf.

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Appendix I – Minor Corrections Applied to Version 002.1

EC Meeting Date	EC Meeting Minutes	Minor Corrections
11-4-08	http://www.naesb.org/pdf4/weq_ec110408fm.doc	<p>Minor correction submitted by the chairs of the Joint WEQ BPS and ESS/ITS: http://www.naesb.org/pdf4/weq_mc111308_attach1.doc</p> <p>Minor correction submitted by Bonneville Power Administration: http://www.naesb.org/pdf4/weq_mc111308_attach2.doc</p>
2-3-09	http://www.naesb.org/pdf4/weq_ec020309dm.doc	<p>Minor correction submitted by Bonneville Power Administration: http://www.naesb.org/pdf4/weq_mc021009_attach.doc</p>

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End Notes WEQ 2008 Annual Plan:

¹ 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.

² The assignments are abbreviated. The abbreviations and committee structure can be found at the end of the annual plan document.

³ For additional information, please see: http://www.naesb.org/pdf3/weq_bps100407w4.ppt for Phase II changes and http://www.naesb.org/pdf2/weq_bps070907w4.doc for Phase III changes.

⁴ [Joint Development Procedure](#) is to be used by the NERC TLR Drafting Team and NAESB BPS.

⁵ For additional information, please see comments submitted by PJM and MISO for this Annual Plan Item: http://www.naesb.org/pdf3/weq_apan102907w1.pdf.

⁶ Joint Development Procedure is to be used by the NERC TLR Drafting Team and NAESB BPS.

⁷ The June 1, 2008 dates included in this Annual Plan Item are assigned as a result of FERC extending deadlines to both NERC and NAESB on ATC related Order No. 890 items.