



## NORTH AMERICAN ENERGY STANDARDS BOARD

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October 7, 2011

Filed Electronically

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

RE: Submittal for NAESB Standards Development to Support Coordination of Requests for Transmission Service Across Multiple Transmission Systems (Docket No. RM05-5-013, Order No. 676-E)

Dear Ms. Bose:

The North American Energy Standards Board ("NAESB") submits this report to the Federal Energy Regulatory Commission ("FERC" or "Commission") regarding NAESB standards development in support of coordination of requests for transmission service across multiple transmission systems, in response to the final rule for "Standards for Business Practices and Communication Protocols for Public Utilities," (Docket No. RM05-5-013, Order No. 676-E), issued by the Federal Energy Regulatory Commission ("FERC" or "Commission") on November 24, 2009. The NAESB standards related to coordination of requests for transmission service across multiple transmission systems were ratified by NAESB membership on August 11, 2011 and became available as final actions. We very much appreciate the time, knowledge and industry leadership provided by all participants, both members and non-members that contributed to the development of this set of standards.

The report is being filed electronically in Adobe Acrobat® Print Document Format (.pdf). All of the documents are also available on the NAESB web site ([www.naesb.org](http://www.naesb.org)). Please feel free to call me at (713) 356-0060 or refer to the NAESB website ([www.naesb.org](http://www.naesb.org)) should you have any questions or need additional information regarding the NAESB DSM-EE standards or any other NAESB work products.

Respectfully submitted,

*Rae McQuade*

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



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cc with enclosures:

Chairman Jon Wellinghoff, Federal Energy Regulatory Commission  
Commissioner Philip D. Moeller, Federal Energy Regulatory Commission  
Commissioner John R. Norris, Federal Energy Regulatory Commission  
Commissioner Marc Spitzer, Federal Energy Regulatory Commission  
Commissioner Cheryl LaFleur, Federal Energy Regulatory Commission

Mr. Michael Bardee, General Counsel of the Commission, Federal Energy Regulatory Commission

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

Ms. Jamie L. Simler, Director, Office of Energy Policy and Innovation, Federal Energy Regulatory Commission

Ms. Valerie Crockett, Chairman and CEO, North American Energy Standards Board

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

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

Mr. Michael D. Desselle, Vice Chairman – WEQ, North American Energy Standards Board

Ms. Kathy York, Chairman WEQ Executive Committee, North American Energy Standards Board

Enclosures (all documents noted in the appendices are available publicly on the NAESB web site – [www.naesb.org](http://www.naesb.org)):

Appendix A OASIS Subcommittee Meeting Minutes Links

Appendix B Executive Committee Meeting Minutes, Comments, Voting Records Links and Availability of Transcripts

Appendix C Ratification Ballots and Results Links

Appendix D 2011 Wholesale Electric Quadrant Annual Plan

Appendix E NAESB Process for Standards Development

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

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

**Docket No. RM05-5-000**

**REPORT OF THE NORTH AMERICAN ENERGY STANDARDS BOARD**

The North American Energy Standards Board (NAESB) is voluntarily submitting this report in response to the Federal Energy Regulatory Commission's (FERC or the Commission) FERC Order No. 676-E, Final Rule on Standards for Business Practices and Communication Protocols for Public Utilities (Docket No. RM05-5-013)<sup>1</sup> and FERC Order No. 890, Final Rule on Preventing Undue Discrimination and Preference in Transmission Service (Docket Nos. RM05-17-000 and RM05-25-000).<sup>2</sup>

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 standards<sup>3</sup> were adopted by the WEQ and published on January 15, 2005. NAESB WEQ Version 1 standards<sup>4</sup> were adopted by the WEQ and published on October 31, 2007 and subsequently filed with the Commission on December 21, 2007.<sup>5</sup> NAESB WEQ Version 2 standards<sup>6</sup> were adopted by the WEQ and filed with the Commission on August 29, 2008<sup>7</sup> and subsequently published on September 30, 2008, with the ratification record filed on November 14, 2008.<sup>8</sup> NAESB Version 2.1

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<sup>1</sup> Final Rule on Standards for Business Practices and Communication Protocols for Public Utilities, FERC Order No. 676-E (November 24, 2009), 18 C.F.R. §38.2 , ¶105, can be accessed from <http://elibrary.ferc.gov/idmws/common/opennat.asp?fileID=12205059>.

<sup>2</sup> 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. ¶---- (2008).

<sup>3</sup> NAESB Version 0 standards (Docket No. RM05-5-000), available at <http://elibrary.ferc.gov/idmws/common/opennat.asp?fileID=10369845>. (submitted January 18, 2005).

<sup>4</sup> 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\\_check.asp?doc=weq\\_bklet\\_041808.pdf](http://www.naesb.org/member_login_check.asp?doc=weq_bklet_041808.pdf). This document is password protected. Non-members should contact the NAESB office to access this document.

<sup>5</sup> NAESB Report on the Standards for Business Practices of Public Utilities, Version 1.0, available at [http://www.naesb.org/doc\\_view4.asp?doc=ferc122107.pdf](http://www.naesb.org/doc_view4.asp?doc=ferc122107.pdf) (submitted December 21, 2007). This document is password protected. Non-members should contact the NAESB office to access this document.

<sup>6</sup> NAESB Version 002 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\\_check.asp?doc=weq\\_bklet\\_093008\\_mc090809.pdf](http://www.naesb.org/member_login_check.asp?doc=weq_bklet_093008_mc090809.pdf). This document is password protected. Non-members should contact the NAESB office to access this document.

<sup>7</sup> NAESB Report to the FERC on Order Nos. 809, 890-A, WEQ Version 2.0 Filing – Standards for Business Practices of Public Utilities, available at [http://naesb.org/pdf3/ferc082908\\_order\\_890\\_filing.pdf](http://naesb.org/pdf3/ferc082908_order_890_filing.pdf) (submitted August 29, 2008).

<sup>8</sup> NAESB Report to the FERC to Supplement the August 28, 2008 Version 2.0 WEQ Standards Filing, available at [http://www.naesb.org/pdf4/ferc111408\\_weq\\_v002\\_supp\\_filing.pdf](http://www.naesb.org/pdf4/ferc111408_weq_v002_supp_filing.pdf).

standards<sup>9</sup> were adopted by the WEQ and published on March 11, 2009 and filed with the Commission on February 19, 2009,<sup>10</sup> with the ratification record filed on March 12, 2009.<sup>11</sup>

The WEQ Executive Committee (EC) formed a task force during the February 2, 2010 EC meeting<sup>12</sup> to determine the scope for the Open Access Same-Time Information Systems (OASIS) subcommittee addressing the Service Across Multiple Transmission Systems (SAMTS)-related annual plan items. The WEQ EC task force met nine times, from March, 2010 to June, 2010, to accomplish this assignment. The task force prepared a unanimously supported recommended scope<sup>13</sup> for the development of the SAMTS standards. The scope was approved by the WEQ EC on August 17, 2010.<sup>14</sup> As stated in our previous FERC status update filing,<sup>15</sup> the OASIS subcommittee focused its efforts on Network Integrated Transmission Systems (NITS) standards prior to the start of the SAMTS effort. Therefore, the NAESB OASIS Subcommittee did not focus its efforts on SAMTS until January, 2011. The NAESB OASIS Subcommittee meetings worked to develop these standards from January, 2011 to June, 2011. In total, there were 14 subcommittee meetings, totaling 141 hours, focused on SAMTS issues. Throughout the development process, there were six WEQ EC meetings where the OASIS standards development effort was discussed. All meetings were open to all interested parties and were publicly noticed, and were available by phone and web cast for those unable to travel. The meetings were held in geographically diverse locations. Any interested party was encouraged to submit comments if their schedules would not permit them to participate either in person or over the phone/web cast. The minutes of these meetings are provided as links in Appendices A and B, which include the transcripts of the WEQ EC meetings, the voting record of the WEQ EC, and include all comments filed as part of the formal comment period for the proposed SAMTS standards. The ratification ballots and member ratification voting records results are also included as links in Appendix C. The 2011 WEQ Annual Plan is contained in Appendix D. An abbreviated review of the NAESB process by which the standards were drafted, considered and adopted is provided in Appendix E. More detailed process descriptions can be accessed from the NAESB web site.

The model business practice standards developed and modified by the OASIS subcommittee were based upon the scope document developed by the WEQ EC task force. As was noted in the last status update to the Commission,<sup>16</sup> the subcommittee determined not to pursue the new state of Provisionally Denied, but rather expanded upon the initial scope to include customer concerns about loss of queue position for requests that are

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<sup>9</sup> NAESB Version 2.1 Standards in Response to FERC Order Nos. 890, 890-A and 890-B, Docket No. RM05-5-013, available at [http://www.naesb.org/member\\_login\\_check.asp?doc=weq\\_bklet\\_031109.pdf](http://www.naesb.org/member_login_check.asp?doc=weq_bklet_031109.pdf). This document is password protected.

<sup>10</sup> NAESB Report to the FERC on Standards for Business Practices of Public Utilities, available at [http://www.naesb.org/pdf4/ferc021909\\_weq\\_v002.1\\_with\\_appendices.pdf](http://www.naesb.org/pdf4/ferc021909_weq_v002.1_with_appendices.pdf) (submitted February 19, 2009).

<sup>11</sup> NAESB WEQ Version 2.1 Supplemental Filing, available at [http://www.naesb.org/pdf4/ferc031209\\_naesb\\_weq\\_version\\_002.1\\_supplemental\\_filing.pdf](http://www.naesb.org/pdf4/ferc031209_naesb_weq_version_002.1_supplemental_filing.pdf).

<sup>12</sup> NAESB WEQ EC Meeting Minutes, available at [http://www.naesb.org/pdf4/weq\\_ec020210fm.doc](http://www.naesb.org/pdf4/weq_ec020210fm.doc). February 2, 2010.

<sup>13</sup> NAESB WEQ EC Task Force Scope Document, available at [http://www.naesb.org/pdf4/weq\\_ec081710a4.doc](http://www.naesb.org/pdf4/weq_ec081710a4.doc), August 17, 2010.

<sup>14</sup> NAESB WEQ EC Meeting Minutes, available at [http://www.naesb.org/pdf4/weq\\_ec081710fm.doc](http://www.naesb.org/pdf4/weq_ec081710fm.doc), August 17, 2010.

<sup>15</sup> NAESB Progress Report on Standards Development to Support Coordination of Requests for Transmission Service Across Multiple Transmission Systems, available at [http://www.naesb.org/pdf4/naesb\\_samts\\_status\\_report\\_ferc\\_030911.pdf](http://www.naesb.org/pdf4/naesb_samts_status_report_ferc_030911.pdf), March 9, 2011.

<sup>16</sup> Id.

queued after the linked requests. As such, the scope statement developed by the WEQ EC task force was modified<sup>17</sup> by the WEQ EC and approved on February 1, 2011.<sup>18</sup>

On May 5, 2011, the OASIS subcommittee voted out the recommendation with the required balanced simple majority vote.<sup>19</sup> The recommendation was sent out for a thirty-day industry comment period<sup>20</sup> on May 11, 2011 and ended on June 10, 2011. A substantive and technical review of the proposed standards by the WEQ EC was held on May 20, 2011 to help provide guidance for industry participants submitting comments.<sup>21</sup> At the close of the comment period, eleven sets of comments were submitted (see Appendix B). The OASIS subcommittee reviewed the comments received on June 20 – 21, 2011 and provided a set of late comments. In addition to the original late comments provided by the OASIS subcommittee, two additional sets of late comments were received, (also available in Appendix B). The WEQ EC met to consider the recommendation and the comments received on June 30, 2011.<sup>22</sup> The vote was inconclusive, so a notational ballot was sent out to the WEQ EC members that were not present to vote at the meeting. Through notational ballots due on July 8, 2011, the EC approved the recommendation with the necessary super majority threshold of 67% and a minimum of 40% affirmative votes from each fully populated segment. The standards were ratified<sup>23</sup> by the WEQ membership on August 11, 2011, after a thirty-day ratification period and posted as a final action.<sup>24</sup>

These standards provide a process by which a customer may complete a cross-regional transaction. The process requires that each affected provider independently evaluate its portion of the linked request, with the opportunity for reconciliation by the customer once all evaluations are complete. After submitting and monitoring requests on multiple systems, the customer can communicate reconciled information to each of the affected providers. As NITS on OASIS is still under development, the SAMTS project focused exclusively on the FERC-approved process in existence, namely for point-to-point transmission service. The network service portion of the SAMTS process will be included in the NITS standards and provided to the Commission as part of the Version 3.0 filing expected to be made mid-year, 2012. The SAMTS process modifies and adds standards or terms to the Abbreviations, Acronyms and Definition of Terms (WEQ-000), the OASIS Business Practice Standards (WEQ-001), the OASIS Standards and Communication Protocols (WEQ-002), The OASIS Data Dictionary (WEQ-003), and the OASIS Implementation Guide (WEQ-013).

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<sup>17</sup> Revised NAESB WEQ EC Task Force Scope Document, available at [http://www.naesb.org/pdf4/weq\\_ec020111w9.doc](http://www.naesb.org/pdf4/weq_ec020111w9.doc), August 17, 2010

<sup>18</sup> NAESB WEQ EC Meeting Minutes, available at [http://www.naesb.org/pdf4/weq\\_ec020111dm.doc](http://www.naesb.org/pdf4/weq_ec020111dm.doc), February 1, 2011

<sup>19</sup> NAESB WEQ OASIS Subcommittee Meeting Minutes, available at [http://www.naesb.org/pdf4/weq\\_oasis050311fm.doc](http://www.naesb.org/pdf4/weq_oasis050311fm.doc), May 5, 2011.

<sup>20</sup> WEQ Request for Comments, available at [http://www.naesb.org/pdf4/weq\\_051111\\_reqcom.doc](http://www.naesb.org/pdf4/weq_051111_reqcom.doc). The comments are located in the row titled, WEQ 2011 Annual Plan Items 2.a.iii.1 through 2.a.iii.3.

<sup>21</sup> NAESB WEQ Executive Committee Meeting Notes, available at [http://www.naesb.org/pdf4/weq\\_ec052011mn.doc](http://www.naesb.org/pdf4/weq_ec052011mn.doc), May 20, 2011.

<sup>22</sup> NAESB WEQ Executive Committee Meeting Minutes, available at [http://www.naesb.org/pdf4/weq\\_ec063011dm.doc](http://www.naesb.org/pdf4/weq_ec063011dm.doc), June 30, 2011.

<sup>23</sup> WEQ Member Ratification of the SAMTS standards, available at <http://www.naesb.org/ratification.asp>. The ratification tally is located on the row dated July 11, 2011.

<sup>24</sup> NAESB 2011 WEQ Annual Plan Items 2.a.iii.1 through 2.a.iii.3 Final Action: Service Across Multiple Transmission Systems, Ratified August 11, 2011, available at [http://www.naesb.org/member\\_login\\_check.asp?doc=fa\\_weq\\_2011\\_ap\\_2aiii1\\_to\\_2aiii3.doc](http://www.naesb.org/member_login_check.asp?doc=fa_weq_2011_ap_2aiii1_to_2aiii3.doc).

Report of the North American Energy Standards Board  
NAESB Wholesale Electric Quadrant Service Across Multiple Transmission Systems (SAMTS) Standards

Following is a table that outlines the standards created or modified to support the inclusion of service across multiple transmission systems. These standards are now a final action and are available on the NAESB website. They will be published as part of WEQ Version 3.0.

Final Action 2011 WEQ Annual Plan Items 2.a.iii.1 through 2.a.iii.3 - Service Across Multiple Transmission Systems (SAMTS) modifications / deletions / additions to be incorporated in NAESB WEQ Business Practice Standards, Version 3.0		
STANDARD NUMBER	DESCRIPTION/TOPIC	ACTION
<b>WEQ-000-2</b>	<b>Abbreviations, Acronyms, and Definition of Terms</b>	
	Coordinated Group	Add Definition
	Coordinated Request	Add Definition
	Network Customer	Add Definition
<b>WEQ-001</b>	<b>Open Access Same-Time Information Systems (OASIS) Business Practice Standards</b>	
WEQ-001-4.6	On-Line Negotiation and Confirmation Process	Modify Standard
WEQ-001-4.7		Modify Standard
WEQ-001-4.7.2		Modify Standard
WEQ-001-4.7.3		Modify Standard
WEQ-001-4.7.3.2		Modify Standard
WEQ-001-4.7.3.4		Modify Standard
WEQ-001-4.7.3.4.1		Add Standard
WEQ-001-4.9		Modify Standard
WEQ-001-4.9.4		Add Standard
WEQ-001-4.9.4.1		Add Standard
WEQ-001-4.9.4.2		Add Standard
WEQ-001-4.10		Modify Standard
WEQ-001-4.10.5		Add Standard
WEQ-001-4.10.6		Add Standard
WEQ-001-4.10.6.1		Add Standard
WEQ-001-4.10.6.2		Add Standard
WEQ-001-4.11		Modify Standard
WEQ-001-4.11.1		Add Standard
WEQ-001-4.13		Modify Standard
WEQ-001-23		Coordination of Requests for Service Across Multiple Transmission Systems
WEQ-001-23.1	General Requirements	Add Standard
WEQ-001-23.1.1		Add Standard
WEQ-001-23.1.2		Add Standard
WEQ-001-23.1.3		Add Standard
WEQ-001-23.1.4		Add Standard
WEQ-001-23.1.5		Add Standard
WEQ-001-23.1.6		Add Standard
WEQ-001-23.1.7		Add Standard
WEQ-001-23.1.8		Add Standard
WEQ-001-23.2	Eligibility	Add Standard

Report of the North American Energy Standards Board  
NAESB Wholesale Electric Quadrant Service Across Multiple Transmission Systems (SAMTS) Standards

Final Action 2011 WEQ Annual Plan Items 2.a.iii.1 through 2.a.iii.3 - Service Across Multiple Transmission Systems (SAMTS) modifications / deletions / additions to be incorporated in NAESB WEQ Business Practice Standards, Version 3.0		
STANDARD NUMBER	DESCRIPTION/TOPIC	ACTION
WEQ-001-23.2.1		Add Standard
WEQ-001-23.2.1.1		Add Standard
WEQ-001-23.2.1.2		Add Standard
WEQ-001-23.2.1.3		Add Standard
WEQ-001-23.2.2		Add Standard
WEQ-001-23.2.3		Add Standard
WEQ-001-23.2.4		Add Standard
WEQ-001-23.3	Processing of Coordinated Requests	Add Standard
WEQ-001-23.3.1		Add Standard
WEQ-001-23.3.2		Add Standard
WEQ-001-23.3.2.1		Add Standard
WEQ-001-23.3.3		Add Standard
WEQ-001-23.3.4		Add Standard
WEQ-001-23.3.4.1		Add Standard
WEQ-001-23.3.4.2		Add Standard
WEQ-001-23.3.4.2.1		Add Standard
WEQ-001-23.3.4.2.2		Add Standard
WEQ-001-23.3.4.3		Add Standard
WEQ-001-23.3.4.3.1		Add Standard
WEQ-001-23.3.5		Add Standard
WEQ-001-23.3.5.1		Add Standard
WEQ-001-23.3.5.2		Add Standard
WEQ-001-23.3.5.3		Add Standard
WEQ-001-23.3.5.4		Add Standard
WEQ-001-23.3.6		Add Standard
WEQ-001-23.3.7		Add Standard
WEQ-001-23.3.8		Add Standard
WEQ-001-23.3.9	Add Standard	
Appendix E	Contiguity Examples for Coordinated Groups	Add Appendix
<b>WEQ-002</b>	<b>Open Access Same-Time Information Systems (OASIS) Business Practice Standards and Communication Protocols (S&amp;CP)</b>	
WEQ-002-4.3.1	Template Summary	Modify Standard
WEQ-002-4.3.6	Purchase Transmission Services	Modify Standard
WEQ-002-4.3.6.1		Modify Standard
WEQ-002-4.3.6.2	Status of Transmission Customer Purchase Request/Reservation (transstatus)	Modify Standard
WEQ-002-4.3.6.2.3	Coordinated Group Status (cgstatus)	Add Standard
WEQ-002-4.3.6.3	Seller Approval of Purchase (transsell)	Modify Standard
WEQ-002-4.3.6.4	Transmission Customer Confirmation of Purchase (transcust)	Modify Standard
WEQ-002-4.3.6.4.1		Update Coordinated Group (cgupdate)

Report of the North American Energy Standards Board  
NAESB Wholesale Electric Quadrant Service Across Multiple Transmission Systems (SAMTS) Standards

Final Action 2011 WEQ Annual Plan Items 2.a.iii.1 through 2.a.iii.3 - Service Across Multiple Transmission Systems (SAMTS) modifications / deletions / additions to be incorporated in NAESB WEQ Business Practice Standards, Version 3.0		
STANDARD NUMBER	DESCRIPTION/TOPIC	ACTION
WEQ-002-4.3.11		Modify Standard
WEQ-002-5.10	Implementation Plan	Modify Standard
WEQ-002-5.10.1	Data Element Cross Reference	Modify Standard
<b>WEQ-003</b>	<b>Open Access Same-Time Information Systems (OASIS) Data Dictionary Business Practice Standards</b>	
	CG_DEADLINE	Add Element
	CG_STATUS	Add Element
	CR_ASSIGNMENT_REF	Add Element
	CR_DISPOSITION	Add Element
	CR_DESPOSITION_TIME	Add Element
	CR_PRIMARY_PROVIDER_CODE	Add Element
	CR_SERVICE_INCREMENT	Add Element
	CR_TS_CLASS	Add Element
	CR_TS_TYPE	Add Element
	STATUS	Modify Element
<b>WEQ-013</b>	<b>Open Access Same-Time Information Systems (OASIS) Implementation Guide Business Practice Standards</b>	
WEQ-013-2	OASIS Transaction Processing	Modify Standard
WEQ-013-2.2	Transaction Status	Modify Standard
WEQ-013-2.2.1	ACCEPTED and CR_ACCEPTED Status Restrictions	Modify Standard
WEQ-013-2.3	Basic OASIS Transaction Handling	Modify Standard
WEQ-013-2.6.1	ORIGINAL Requests	Modify Standard
WEQ-013-2.6.1.1	Offering of Partial Service	Modify Standard
WEQ-013-2.6.1.2	Negotiation of Price	Modify Standard
WEQ-013-2.6.2	RENEWAL Requests	Modify Standard
WEQ-013-2.6.3	MATCHING Requests	Modify Standard
WEQ-013-2.6.5	REDIRECT Requests	Modify Standard
WEQ-013-2.6.5.1	Redirect on a Firm Basis	Modify Standard
WEQ-013-2.6.9	Coordinated Requests	Add Standard
WEQ-013-4.1.5	File Examples of the Use of Continuation Records	Modify Standard
WEQ-013-4.1.6	Examples of Negotiation of Price and Partial Service Offer	Modify Standard
WEQ-013-4.1.6.1	Negotiation with Preconfirmation	Modify Standard
WEQ-013-4.1.6.2	Negotiations without Preconfirmation	Modify Standard
WEQ-013-4.1.6.3	Multiple Step Negotiations	Modify Standard
WEQ-013-4.1.6.4	Negotiations Declined by Seller	Modify Standard
WEQ-013-4.1.6.5	Negotiations withdrawn by Transmission Customer	Modify Standard
WEQ-013-4.1.6.6	Negotiations Superseded by Higher Priority Reservation	Modify Standard



Report of the North American Energy Standards Board  
NAESB Wholesale Electric Quadrant Service Across Multiple Transmission Systems (SAMTS) Standards

Final Action 2011 WEQ Annual Plan Items 2.a.iii.1 through 2.a.iii.3 - Service Across Multiple Transmission Systems (SAMTS) modifications / deletions / additions to be incorporated in NAESB WEQ Business Practice Standards, Version 3.0		
STANDARD NUMBER	DESCRIPTION/TOPIC	ACTION
WEQ-013-4.1.7.2	Reservations	Modify Standard
WEQ-013-4.1.9	Process Flow Example for Service Across Multiple Transmission Systems	Add Standard

This report is intended solely as a status report from NAESB regarding the recently adopted SAMTS standards. NAESB does not advocate that the Commission take a particular position on any of the issues presented. We very much appreciate the work of the industry volunteers in developing the SAMTS standards. Please do not hesitate to contact NAESB should additional information be needed.

Report of the North American Energy Standards Board – Enclosures  
 NAESB Wholesale Electric Quadrant Service Across Multiple Transmission Systems (SAMTS) Standards

Appendix A: WEQ OASIS Subcommittee Meeting Minutes Links  
 October 7, 2011

APPENDIX A – WEQ OASIS SUBCOMMITTEE MEETING MINUTES LINKS			
DATE OF MEETING	MEETING LOCATION	MEETING MINUTES	NUMBER OF PARTICIPANTS
November 12, 2010	WEQ OASIS Subcommittee “Provisionally Denied” Task Force		
November 18, 2010	WEQ OASIS Subcommittee “Provisionally Denied” Task Force		
November 23, 2010	WEQ OASIS Subcommittee “Provisionally Denied” Task Force		
December 3, 2010	WEQ OASIS Subcommittee “Provisionally Denied” Task Force		
December 8, 2010	WEQ OASIS Subcommittee “Provisionally Denied” Task Force		
December 20, 2010	WEQ OASIS Subcommittee “Provisionally Denied” Task Force		
January 5, 2011	WEQ OASIS Subcommittee Conference Call	Meeting Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis010511fm.doc">http://www.naesb.org/pdf4/weq_oasis010511fm.doc</a>	23
January 6, 2011	WEQ OASIS Subcommittee “Provisionally Denied” Task Force		
January 13, 2011	WEQ OASIS Subcommittee Conference Call	Meeting Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis011311fm.doc">http://www.naesb.org/pdf4/weq_oasis011311fm.doc</a>	21
January 19-21, 2011	WEQ OASIS Subcommittee Meeting in Houston, TX Hosted by the NAESB	Meeting Minutes:  Attachment to Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis011911a7.doc">http://www.naesb.org/pdf4/weq_oasis011911a7.doc</a>	
January 25, 2011	WEQ OASIS Subcommittee Conference Call	Meeting Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis012511fm.doc">http://www.naesb.org/pdf4/weq_oasis012511fm.doc</a>  Attachments to Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis012511a1.doc">http://www.naesb.org/pdf4/weq_oasis012511a1.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis012511a2.doc">http://www.naesb.org/pdf4/weq_oasis012511a2.doc</a>	22

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DATE OF MEETING	MEETING LOCATION	MEETING MINUTES	NUMBER OF PARTICIPANTS
		<a href="http://www.naesb.org/pdf4/weq_oasis012511a3.doc">http://www.naesb.org/pdf4/weq_oasis012511a3.doc</a>	
February 2-3, 2011	WEQ OASIS Subcommittee Meeting in Phoenix, AZ Hosted by SRP at the PERA Club	Meeting Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis020211fm.doc">http://www.naesb.org/pdf4/weq_oasis020211fm.doc</a>  Attachment to Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis020211a1.doc">http://www.naesb.org/pdf4/weq_oasis020211a1.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis020211a2.doc">http://www.naesb.org/pdf4/weq_oasis020211a2.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis020211a3.doc">http://www.naesb.org/pdf4/weq_oasis020211a3.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis020211a4.doc">http://www.naesb.org/pdf4/weq_oasis020211a4.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis020211a5.xls">http://www.naesb.org/pdf4/weq_oasis020211a5.xls</a>	21
February 8-9, 2011	WEQ OASIS Subcommittee Conference Call	Meeting Minutes <a href="http://www.naesb.org/pdf4/weq_oasis020811fm.doc">http://www.naesb.org/pdf4/weq_oasis020811fm.doc</a>  Attachments to Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis020811a1.doc">http://www.naesb.org/pdf4/weq_oasis020811a1.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis020811a2.doc">http://www.naesb.org/pdf4/weq_oasis020811a2.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis020811a3.doc">http://www.naesb.org/pdf4/weq_oasis020811a3.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis020811a4.doc">http://www.naesb.org/pdf4/weq_oasis020811a4.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis020811a5.xls">http://www.naesb.org/pdf4/weq_oasis020811a5.xls</a> <a href="http://www.naesb.org/pdf4/weq_oasis020811a6.doc">http://www.naesb.org/pdf4/weq_oasis020811a6.doc</a>	19
February 23, 2011	WEQ OASIS Subcommittee Conference Call	Meeting Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis022311fm.doc">http://www.naesb.org/pdf4/weq_oasis022311fm.doc</a>  Attachments to Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis022311a1.doc">http://www.naesb.org/pdf4/weq_oasis022311a1.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis022311a2.doc">http://www.naesb.org/pdf4/weq_oasis022311a2.doc</a>	21
March 1-3, 2011	WEQ OASIS Subcommittee Meeting in Carmel, IN Hosted by Midwest ISO	Meeting Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis030111dm.doc">http://www.naesb.org/pdf4/weq_oasis030111dm.doc</a>  Attachments to Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis030111a1.doc">http://www.naesb.org/pdf4/weq_oasis030111a1.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis030111a2.doc">http://www.naesb.org/pdf4/weq_oasis030111a2.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis030111a3.doc">http://www.naesb.org/pdf4/weq_oasis030111a3.doc</a>	17

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DATE OF MEETING	MEETING LOCATION	MEETING MINUTES	NUMBER OF PARTICIPANTS
March 11, 2011	WEQ OASIS Subcommittee Conference Call	Meeting Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis031111fm.doc">http://www.naesb.org/pdf4/weq_oasis031111fm.doc</a>  Attachments to Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis031111a1.doc">http://www.naesb.org/pdf4/weq_oasis031111a1.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis031111a2.doc">http://www.naesb.org/pdf4/weq_oasis031111a2.doc</a>	17
March 16, 2011	WEQ OASIS Subcommittee Conference Call	Meeting Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis031611fm.doc">http://www.naesb.org/pdf4/weq_oasis031611fm.doc</a>  Attachments to Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis031611a1.doc">http://www.naesb.org/pdf4/weq_oasis031611a1.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis031611a3.doc">http://www.naesb.org/pdf4/weq_oasis031611a3.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis031611a4.doc">http://www.naesb.org/pdf4/weq_oasis031611a4.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis031611a5.doc">http://www.naesb.org/pdf4/weq_oasis031611a5.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis031611a6.doc">http://www.naesb.org/pdf4/weq_oasis031611a6.doc</a>	16
March 22, 2011	WEQ OASIS Subcommittee Conference Call	Meeting Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis032211fm.doc">http://www.naesb.org/pdf4/weq_oasis032211fm.doc</a>  Attachments to Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis032211a1.doc">http://www.naesb.org/pdf4/weq_oasis032211a1.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis032211a3.doc">http://www.naesb.org/pdf4/weq_oasis032211a3.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis032211a4.doc">http://www.naesb.org/pdf4/weq_oasis032211a4.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis032211a5.doc">http://www.naesb.org/pdf4/weq_oasis032211a5.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis032211a6.doc">http://www.naesb.org/pdf4/weq_oasis032211a6.doc</a>	14
March 28, 2011	WEQ OASIS Subcommittee Conference Call	Meeting Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis032811fm.doc">http://www.naesb.org/pdf4/weq_oasis032811fm.doc</a>  Attachments to Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis032811a1.doc">http://www.naesb.org/pdf4/weq_oasis032811a1.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis032811a2.doc">http://www.naesb.org/pdf4/weq_oasis032811a2.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis032811a3.doc">http://www.naesb.org/pdf4/weq_oasis032811a3.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis032811a4.doc">http://www.naesb.org/pdf4/weq_oasis032811a4.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis032811a5.doc">http://www.naesb.org/pdf4/weq_oasis032811a5.doc</a>	10

APPENDIX A – WEQ OASIS SUBCOMMITTEE MEETING MINUTES LINKS

DATE OF MEETING	MEETING LOCATION	MEETING MINUTES	NUMBER OF PARTICIPANTS
April 14-15, 2011	WEQ OASIS Subcommittee Conference Call	Meeting Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis041411fm.doc">http://www.naesb.org/pdf4/weq_oasis041411fm.doc</a>  Attachments to Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis041411a1.doc">http://www.naesb.org/pdf4/weq_oasis041411a1.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis041411a2.doc">http://www.naesb.org/pdf4/weq_oasis041411a2.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis041411a3.doc">http://www.naesb.org/pdf4/weq_oasis041411a3.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis041411a4.doc">http://www.naesb.org/pdf4/weq_oasis041411a4.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis041411a5.doc">http://www.naesb.org/pdf4/weq_oasis041411a5.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis041411a6.doc">http://www.naesb.org/pdf4/weq_oasis041411a6.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis041411a8.ppt">http://www.naesb.org/pdf4/weq_oasis041411a8.ppt</a> <a href="http://www.naesb.org/pdf4/weq_oasis041411a9.xls">http://www.naesb.org/pdf4/weq_oasis041411a9.xls</a> <a href="http://www.naesb.org/pdf4/weq_oasis041411a10.doc">http://www.naesb.org/pdf4/weq_oasis041411a10.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis041411a11.doc">http://www.naesb.org/pdf4/weq_oasis041411a11.doc</a>	19

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DATE OF MEETING	MEETING LOCATION	MEETING MINUTES	NUMBER OF PARTICIPANTS
April 18, 2011	WEQ OASIS Subcommittee Request for Informal Comments due April 29, 2011	Request for Informal Comments due April 29, 2011: <a href="http://www.naesb.org/pdf4/weq_oasis041811reqcom.doc">http://www.naesb.org/pdf4/weq_oasis041811reqcom.doc</a> Attachment to Request for Informal Comments: <a href="http://www.naesb.org/pdf4/weq_oasis041811reqcom_a1.doc">http://www.naesb.org/pdf4/weq_oasis041811reqcom_a1.doc</a>  Comments submitted by E. Davis, Entergy: <a href="http://www.naesb.org/pdf4/weq_oasis041811_entergy.doc">http://www.naesb.org/pdf4/weq_oasis041811_entergy.doc</a> Comments submitted by C. Javornik, Tri-State Generation and Transmission: <a href="http://www.naesb.org/pdf4/weq_oasis041811_tristate.doc">http://www.naesb.org/pdf4/weq_oasis041811_tristate.doc</a> Comments submitted by E. Cardone, NYISO: <a href="http://www.naesb.org/pdf4/weq_oasis041811_nyiso.doc">http://www.naesb.org/pdf4/weq_oasis041811_nyiso.doc</a> Comments submitted by P. Sorenson, OATI: <a href="http://www.naesb.org/pdf4/weq_oasis041811_oati.doc">http://www.naesb.org/pdf4/weq_oasis041811_oati.doc</a> Comments submitted by JT Wood, Southern Company: <a href="http://www.naesb.org/pdf4/weq_oasis041811_southern.doc">http://www.naesb.org/pdf4/weq_oasis041811_southern.doc</a> Comments submitted by M. Knox on behalf of Midwest ISO, PJM and SPP: <a href="http://www.naesb.org/pdf4/weq_oasis041811_miso_pjm_spp.doc">http://www.naesb.org/pdf4/weq_oasis041811_miso_pjm_spp.doc</a> Comments submitted by P. Lee, BPA: <a href="http://www.naesb.org/pdf4/weq_oasis041811_bpa.doc">http://www.naesb.org/pdf4/weq_oasis041811_bpa.doc</a> Late comments submitted by H. Burnette, TVA: <a href="http://www.naesb.org/pdf4/weq_oasis041811_tva_late.docx">http://www.naesb.org/pdf4/weq_oasis041811_tva_late.docx</a> Late comments submitted by J. Manning, NCEMC: <a href="http://www.naesb.org/pdf4/weq_oasis041811_ncemc_late.doc">http://www.naesb.org/pdf4/weq_oasis041811_ncemc_late.doc</a>	NA
April 20, 2011	WEQ OASIS Subcommittee Conference Call	Meeting Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis042011fm.doc">http://www.naesb.org/pdf4/weq_oasis042011fm.doc</a>  Attachments to Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis042011a1.doc">http://www.naesb.org/pdf4/weq_oasis042011a1.doc</a>	13

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DATE OF MEETING	MEETING LOCATION	MEETING MINUTES	NUMBER OF PARTICIPANTS
May 3-5, 2011	WEQ OASIS Subcommittee Meeting in Carmel, IN Hosted by ACES Power Marketing	Meeting Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis050311dm.doc">http://www.naesb.org/pdf4/weq_oasis050311dm.doc</a>  Attachments to Minutes: <a href="http://www.naesb.org/pdf4/weq_oasis050311a1.doc">http://www.naesb.org/pdf4/weq_oasis050311a1.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis050311a2.doc">http://www.naesb.org/pdf4/weq_oasis050311a2.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis050311a7.doc">http://www.naesb.org/pdf4/weq_oasis050311a7.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis050311a8.doc">http://www.naesb.org/pdf4/weq_oasis050311a8.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis050311a9.doc">http://www.naesb.org/pdf4/weq_oasis050311a9.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis050311a10.doc">http://www.naesb.org/pdf4/weq_oasis050311a10.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis050311a11.doc">http://www.naesb.org/pdf4/weq_oasis050311a11.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis050311a12.doc">http://www.naesb.org/pdf4/weq_oasis050311a12.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis050311a13.doc">http://www.naesb.org/pdf4/weq_oasis050311a13.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis050311a14.doc">http://www.naesb.org/pdf4/weq_oasis050311a14.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis050311a15.doc">http://www.naesb.org/pdf4/weq_oasis050311a15.doc</a> <a href="http://www.naesb.org/pdf4/weq_oasis050311a16.doc">http://www.naesb.org/pdf4/weq_oasis050311a16.doc</a>	21

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APPENDIX B – EXECUTIVE COMMITTEE MEETING MINUTES, COMMENTS, VOTING RECORDS LINKS AND AVAILABILITY OF TRANSCRIPTS			
DATE	LINK TO EXECUTIVE COMMITTEE MINUTES AND VOTING RECORDS	LINK TO COMMENTS	AVAILABILITY OF TRANSCRIPTS <sup>1</sup>
March 22, 2010	NAESB WEQ Executive Committee Scoping Task Force on Coordination of Service Across Multiple Transmission Systems (SAMTS) Conference Call WEQ EC Meeting Notes: <a href="http://www.naesb.org/pdf4/weq_ec_samts_032210notes.doc">http://www.naesb.org/pdf4/weq_ec_samts_032210notes.doc</a>  Attachment to Meeting Notes: <a href="http://www.naesb.org/pdf4/weq_ec_samts_032210a1.doc">http://www.naesb.org/pdf4/weq_ec_samts_032210a1.doc</a>	No comments requested or provided relating to the WEQ SAMTS standards	No transcripts provided
March 31, 2010	NAESB WEQ Executive Committee Scoping Task Force on Coordination of Service Across Multiple Transmission Systems (SAMTS) Conference Call WEQ EC Meeting Notes: <a href="http://www.naesb.org/pdf4/weq_ec_samts_033110notes.doc">http://www.naesb.org/pdf4/weq_ec_samts_033110notes.doc</a>  Attachments to Meeting Notes: <a href="http://www.naesb.org/pdf4/weq_ec_samts_033110a1.doc">http://www.naesb.org/pdf4/weq_ec_samts_033110a1.doc</a> <a href="http://www.naesb.org/pdf4/weq_ec_samts_033110a2.doc">http://www.naesb.org/pdf4/weq_ec_samts_033110a2.doc</a> <a href="http://www.naesb.org/pdf4/weq_ec_samts_033110a3.doc">http://www.naesb.org/pdf4/weq_ec_samts_033110a3.doc</a>	No comments requested or provided relating to the WEQ SAMTS standards	No transcripts provided
April 26, 2010	NAESB WEQ Executive Committee Scoping Task Force on Coordination of Service Across Multiple Transmission Systems (SAMTS) Conference Call WEQ EC Meeting Notes: <a href="http://www.naesb.org/pdf4/weq_ec_samts_042610notes.doc">http://www.naesb.org/pdf4/weq_ec_samts_042610notes.doc</a>  Attachments to Meeting Notes: <a href="http://www.naesb.org/pdf4/weq_ec_samts_042610a1.doc">http://www.naesb.org/pdf4/weq_ec_samts_042610a1.doc</a> <a href="http://www.naesb.org/pdf4/weq_ec_samts_042610a2.doc">http://www.naesb.org/pdf4/weq_ec_samts_042610a2.doc</a>	No comments requested or provided relating to the WEQ SAMTS standards	No transcripts provided

<sup>1</sup> 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.



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DATE	LINK TO EXECUTIVE COMMITTEE MINUTES AND VOTING RECORDS	LINK TO COMMENTS	AVAILABILITY OF TRANSCRIPTS <sup>1</sup>
May 19, 2010	NAESB WEQ Executive Committee Scoping Task Force on Coordination of Service Across Multiple Transmission Systems (SAMTS) Conference Call WEQ EC Meeting Notes: <a href="http://www.naesb.org/pdf4/weq_ec_samts_051910notes.doc">http://www.naesb.org/pdf4/weq_ec_samts_051910notes.doc</a>  Attachment to Meeting Notes: <a href="http://www.naesb.org/pdf4/weq_ec_samts_051910a1.rtf">http://www.naesb.org/pdf4/weq_ec_samts_051910a1.rtf</a>	No comments requested or provided relating to the WEQ SAMTS standards	No transcripts provided
June 1, 2010	NAESB WEQ Executive Committee Scoping Task Force on Coordination of Service Across Multiple Transmission Systems (SAMTS) Conference Call WEQ EC Meeting Notes: <a href="http://www.naesb.org/pdf4/weq_ec_samts_060110notes.doc">http://www.naesb.org/pdf4/weq_ec_samts_060110notes.doc</a>  Attachment to Meeting Notes: <a href="http://www.naesb.org/pdf4/weq_ec_samts_060110a1.rtf">http://www.naesb.org/pdf4/weq_ec_samts_060110a1.rtf</a>	No comments requested or provided relating to the WEQ SAMTS standards	No transcripts provided
June 14, 2010	NAESB WEQ Executive Committee Scoping Task Force on Coordination of Service Across Multiple Transmission Systems (SAMTS) Conference Call WEQ EC Meeting Notes:  Attachment to Meeting Notes: <a href="http://www.naesb.org/pdf4/weq_ec_samts_061410a1.rtf">http://www.naesb.org/pdf4/weq_ec_samts_061410a1.rtf</a> <a href="http://www.naesb.org/pdf4/weq_ec_samts_061410a2.doc">http://www.naesb.org/pdf4/weq_ec_samts_061410a2.doc</a> <a href="http://www.naesb.org/pdf4/weq_ec_samts_061410a3.rtf">http://www.naesb.org/pdf4/weq_ec_samts_061410a3.rtf</a>	No comments requested or provided relating to the WEQ SAMTS standards	No transcripts provided

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APPENDIX B – EXECUTIVE COMMITTEE MEETING MINUTES, COMMENTS, VOTING RECORDS LINKS AND AVAILABILITY OF TRANSCRIPTS			
DATE	LINK TO EXECUTIVE COMMITTEE MINUTES AND VOTING RECORDS	LINK TO COMMENTS	AVAILABILITY OF TRANSCRIPTS <sup>1</sup>
June 15, 2010	<p>NAESB WEQ Executive Committee Scoping Task Force on Coordination of Service Across Multiple Transmission Systems (SAMTS) Conference Call                      WEQ EC Meeting Notes:</p> <p>Attachments to Meeting Notes:  <a href="http://www.naesb.org/pdf4/weq_ec_samts_061510a1.rtf">http://www.naesb.org/pdf4/weq_ec_samts_061510a1.rtf</a>  <a href="http://www.naesb.org/pdf4/weq_ec_samts_061510a2.rtf">http://www.naesb.org/pdf4/weq_ec_samts_061510a2.rtf</a>  <a href="http://www.naesb.org/pdf4/weq_ec_samts_061510a3.rtf">http://www.naesb.org/pdf4/weq_ec_samts_061510a3.rtf</a>  <a href="http://www.naesb.org/pdf4/weq_ec_samts_061510a4.rtf">http://www.naesb.org/pdf4/weq_ec_samts_061510a4.rtf</a>  <a href="http://www.naesb.org/pdf4/weq_ec_samts_061510a5.doc">http://www.naesb.org/pdf4/weq_ec_samts_061510a5.doc</a>  <a href="http://www.naesb.org/pdf4/weq_ec_samts_061510a6.doc">http://www.naesb.org/pdf4/weq_ec_samts_061510a6.doc</a></p>	No comments requested or provided relating to the WEQ SAMTS standards	No transcripts provided
June 18, 2010	<p>NAESB WEQ Executive Committee Scoping Task Force on Coordination of Service Across Multiple Transmission Systems (SAMTS) Conference Call                      WEQ EC Meeting Notes:  <a href="http://www.naesb.org/pdf4/weq_ec_samts_061810notes.doc">http://www.naesb.org/pdf4/weq_ec_samts_061810notes.doc</a></p> <p>Attachments to Meeting Notes:  <a href="http://www.naesb.org/pdf4/weq_ec_samts_061810a1.doc">http://www.naesb.org/pdf4/weq_ec_samts_061810a1.doc</a>  <a href="http://www.naesb.org/pdf4/weq_ec_samts_061810a2.doc">http://www.naesb.org/pdf4/weq_ec_samts_061810a2.doc</a>  <a href="http://www.naesb.org/pdf4/weq_ec_samts_061810a3.doc">http://www.naesb.org/pdf4/weq_ec_samts_061810a3.doc</a>  <a href="http://www.naesb.org/pdf4/weq_ec_samts_061810a4.doc">http://www.naesb.org/pdf4/weq_ec_samts_061810a4.doc</a>  <a href="http://www.naesb.org/pdf4/weq_ec_samts_061810a5.doc">http://www.naesb.org/pdf4/weq_ec_samts_061810a5.doc</a>  <a href="http://www.naesb.org/pdf4/weq_ec_samts_061810a6.doc">http://www.naesb.org/pdf4/weq_ec_samts_061810a6.doc</a></p>	No comments requested or provided relating to the WEQ SAMTS standards	No transcripts provided
August 17, 2010	<p>NAESB WEQ Executive Committee Meeting in Colorado Springs CO, Hosted by El Paso                      Meeting Minutes:  <a href="http://www.naesb.org/pdf4/weq_ec081710fm.doc">http://www.naesb.org/pdf4/weq_ec081710fm.doc</a></p> <p>Attachments to Minutes:  <a href="http://www.naesb.org/pdf4/weq_ec081710motions.doc">http://www.naesb.org/pdf4/weq_ec081710motions.doc</a>  <a href="http://www.naesb.org/pdf4/weq_ec081710a1.doc">http://www.naesb.org/pdf4/weq_ec081710a1.doc</a>  <a href="http://www.naesb.org/pdf4/weq_ec081710a2.doc">http://www.naesb.org/pdf4/weq_ec081710a2.doc</a>  <a href="http://www.naesb.org/pdf4/weq_ec081710a3.doc">http://www.naesb.org/pdf4/weq_ec081710a3.doc</a>  <a href="http://www.naesb.org/pdf4/weq_ec081710a4.doc">http://www.naesb.org/pdf4/weq_ec081710a4.doc</a></p>	No comments requested or provided relating to the WEQ SAMTS standards	Agren Blando Court Reporting – 303-296-0017

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DATE	LINK TO EXECUTIVE COMMITTEE MINUTES AND VOTING RECORDS	LINK TO COMMENTS	AVAILABILITY OF TRANSCRIPTS <sup>1</sup>
February 1, 2011	<p>NAESB WEQ Executive Committee Meeting in Phoenix, AZ, Hosted by SRP at the PERA Club                      Meeting Minutes:  <a href="http://www.naesb.org/pdf4/weq_ec020111dm.doc">http://www.naesb.org/pdf4/weq_ec020111dm.doc</a></p> <p>Attachments to Minutes:  <a href="http://www.naesb.org/pdf4/weq_ec020111a6.doc">http://www.naesb.org/pdf4/weq_ec020111a6.doc</a>  <a href="http://www.naesb.org/pdf4/weq_ec020111a2.doc">http://www.naesb.org/pdf4/weq_ec020111a2.doc</a>  <a href="http://www.naesb.org/pdf4/weq_ec020111a3.doc">http://www.naesb.org/pdf4/weq_ec020111a3.doc</a>  <a href="http://www.naesb.org/pdf4/weq_ec020111a4.doc">http://www.naesb.org/pdf4/weq_ec020111a4.doc</a>  <a href="http://www.naesb.org/pdf4/weq_ec020111a5.doc">http://www.naesb.org/pdf4/weq_ec020111a5.doc</a></p> <p>WEQ Notational Ballot due February 18, 2011:  <a href="http://www.naesb.org/pdf4/weq_ec020111ballot.doc">http://www.naesb.org/pdf4/weq_ec020111ballot.doc</a>                      Results:</p>	No comments requested or provided relating to the WEQ SAMTS standards	Jill Vaughn, CSR – 281-853-6807
May 11, 2011	<p>Request for Formal Comments due June 10, 2011:  <a href="http://www.naesb.org/pdf4/weq_051111_reqcom.doc">http://www.naesb.org/pdf4/weq_051111_reqcom.doc</a></p> <p>Attachment to Request for Formal Comments:  <a href="http://www.naesb.org/pdf4/weq_2011_ap_2aiii1_to_2aiii3_rec.doc">http://www.naesb.org/pdf4/weq_2011_ap_2aiii1_to_2aiii3_rec.doc</a></p>	<p>Comments Submitted by A. Pritchard, Duke Energy:  <a href="http://www.naesb.org/pdf4/weq_051111_duke_energy.docx">http://www.naesb.org/pdf4/weq_051111_duke_energy.docx</a></p> <p>Comments Submitted by the WEQ Standards Review Subcommittee:  <a href="http://www.naesb.org/pdf4/weq_051111_weq_srs.doc">http://www.naesb.org/pdf4/weq_051111_weq_srs.doc</a></p> <p>Comments Submitted by J. Manning, North Carolina Electric Membership Corp.:  <a href="http://www.naesb.org/pdf4/weq_051111_ncemc.doc">http://www.naesb.org/pdf4/weq_051111_ncemc.doc</a></p> <p>Comments Submitted by E. Cardone, NYISO:  <a href="http://www.naesb.org/pdf4/weq_051111_nyiso.doc">http://www.naesb.org/pdf4/weq_051111_nyiso.doc</a></p> <p>Comments Submitted by R. True, ACES Power Marketing:  <a href="http://www.naesb.org/pdf4/weq_051111_aces.doc">http://www.naesb.org/pdf4/weq_051111_aces.doc</a></p> <p>Summary of Comments Submitted by R. True, ACES Power Marketing:  <a href="http://www.naesb.org/pdf4/weq_051111_aces_summary.doc">http://www.naesb.org/pdf4/weq_051111_aces_summary.doc</a></p>	Jill Vaughn, CSR – 281-853-6807

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DATE	LINK TO EXECUTIVE COMMITTEE MINUTES AND VOTING RECORDS	LINK TO COMMENTS	AVAILABILITY OF TRANSCRIPTS <sup>1</sup>
		<p>Comments Submitted by E. Skiba on behalf of ERCOT, IESO, MISO, NYISO, PJM, and SPP:  <a href="http://www.naesb.org/pdf4/weq_051111_iso_rtos.doc">http://www.naesb.org/pdf4/weq_051111_iso_rtos.doc</a></p> <p>Comments Submitted by E. Skiba, Midwest ISO:  <a href="http://www.naesb.org/pdf4/weq_051111_midwest_iso.doc">http://www.naesb.org/pdf4/weq_051111_midwest_iso.doc</a></p> <p>Comments Submitted by R. Pysh, the United Illuminating Company:  <a href="http://www.naesb.org/pdf4/weq_051111_ui.doc">http://www.naesb.org/pdf4/weq_051111_ui.doc</a></p> <p>Comments Submitted by P. Lee, Bonneville Power Administration:  <a href="http://www.naesb.org/pdf4/weq_051111_bpa.doc">http://www.naesb.org/pdf4/weq_051111_bpa.doc</a></p> <p>Comments Submitted by Y. Etheredge, Entergy:  <a href="http://www.naesb.org/pdf4/weq_051111_entergy.docx">http://www.naesb.org/pdf4/weq_051111_entergy.docx</a></p> <p>Late Comments Submitted by JT Wood, Southern Company:  <a href="http://www.naesb.org/pdf4/weq_051111_soco_late.doc">http://www.naesb.org/pdf4/weq_051111_soco_late.doc</a></p> <p>Late Comments Submitted by the WEQ OASIS:  <a href="http://www.naesb.org/pdf4/weq_051111_weq_oasis_late.doc">http://www.naesb.org/pdf4/weq_051111_weq_oasis_late.doc</a></p> <p>Late Formal Comments Submitted by the WEQ OASIS on 06/24/2011:  <a href="http://www.naesb.org/pdf4/weq_051111_weq_oasis_2_late.doc">http://www.naesb.org/pdf4/weq_051111_weq_oasis_2_late.doc</a></p> <p>Late Formal Comments (to the Late Formal Comments Submitted by the OASIS Subcommittee) Submitted by E. Skiba, Midwest ISO:  <a href="http://www.naesb.org/pdf4/weq_051111_midwest_iso_late.doc">http://www.naesb.org/pdf4/weq_051111_midwest_iso_late.doc</a></p>	

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DATE	LINK TO EXECUTIVE COMMITTEE MINUTES AND VOTING RECORDS	LINK TO COMMENTS	AVAILABILITY OF TRANSCRIPTS <sup>1</sup>
May 20, 2011	NAESB WEQ Executive Committee Single Topic Review Session Conference Call Meeting Notes: <a href="http://www.naesb.org/pdf4/weq_ec052011mn.doc">http://www.naesb.org/pdf4/weq_ec052011mn.doc</a>	No comments requested or provided relating to the WEQ SAMTS standards	No transcripts provided for review session
June 20, 2011	NAESB WEQ Executive Committee Single Topic Meeting in Austin, TX, Hosted by ERCOT Meeting Minutes: <a href="http://www.naesb.org/pdf4/weq_ec063011dm.doc">http://www.naesb.org/pdf4/weq_ec063011dm.doc</a> Attachments to Minutes: <a href="http://www.naesb.org/pdf4/weq_ec063011motions.doc">http://www.naesb.org/pdf4/weq_ec063011motions.doc</a> <a href="http://www.naesb.org/pdf4/weq_ec063011a1.doc">http://www.naesb.org/pdf4/weq_ec063011a1.doc</a> Notational Ballot due July 8, 2011: <a href="http://www.naesb.org/pdf4/weq_ec063011ballot.doc">http://www.naesb.org/pdf4/weq_ec063011ballot.doc</a> Results: <a href="http://www.naesb.org/pdf4/weq_ec063011ballot_results.doc">http://www.naesb.org/pdf4/weq_ec063011ballot_results.doc</a>	No comments requested or provided relating to the WEQ SAMTS standards	Jill Vaughn, CSR – 281-853-6807

APPENDIX C – RATIFICATION BALLOT AND RATIFICATION RESULTS

DATE OF RATIFICATION	RATIFICATION BALLOT	RESULTS	FINAL ACTIONS
July 11, 2011	Ratification Ballot due August 11, 2011: <a href="http://www.naesb.org/member_login_form.asp?doc=weq_rat071111ballot.doc">http://www.naesb.org/member_login_form.asp?doc=weq_rat071111ballot.doc</a>  Recommendation: WEQ 2011 Annual Plan Items 2.a.iii.1 through 2.a.iii.3 - Service Across Multiple Transmission Systems (SAMTS) as approved by the WEQ Executive Committee via notational ballot on July 8, 2011: <a href="http://www.naesb.org/member_login_form.asp?doc=weq_rat071111_weq_2011_ap_2aii1_to_2aii3_rec.doc">http://www.naesb.org/member_login_form.asp?doc=weq_rat071111_weq_2011_ap_2aii1_to_2aii3_rec.doc</a>	Ratification Tally: <a href="http://www.naesb.org/member_login_form.asp?doc=rat_weq081111tally.xls">http://www.naesb.org/member_login_form.asp?doc=rat_weq081111tally.xls</a>	WEQ 2011 Annual Plan Items 2.a.iii.1 through 2.a.iii.3 Final Action - Service Across Multiple Transmission Systems (SAMTS) as approved by the WEQ Executive Committee via notational ballot on July 8, 2011 and ratified by the WEQ Membership on August 11, 2011: <a href="http://www.naesb.org/member_login_form.asp?doc=fa_weq_2011_ap_2aii1_to_2aii3.doc">http://www.naesb.org/member_login_form.asp?doc=fa_weq_2011_ap_2aii1_to_2aii3.doc</a>

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Item Description	Completion <sup>1</sup>	Assignment <sup>2</sup>
<b>1 Develop business practices standards as needed to complement reliability standards</b>		
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) Parallel Flow Visualization/Mitigation for Reliability Coordinators in the Eastern Interconnection – Permanent Solution  Note: Consideration should be given to provisional item 4. Work is being coordinated with the NERC IDC Working Group.  Status: Started	4 <sup>th</sup> Q, 2011	BPS
b) Perform consistency review of WEQ-008 Transmission Loading Relief Business Practice Standards and develop recommendation. <sup>26</sup>	2012	BPS
c) DCS and AGC (BAL-002 and BAL-005) Coordination with NERC  Status: Monitor. (Will require coordination with Balancing Authority Reliability Based Controls Group created in July 2010 NERC Project 2010-14)	TBD <sup>2</sup>	TIMTF
d) Coordinate with NERC on the functional model glossary revisions <a href="#">NERC Project 2010-08</a>	TBD	SRS
e) Coordinate with NERC on changes to the definition of Bulk Electric System <a href="#">NERC Project 2010-17</a>	TBD	SRS
<b>2 Develop business practice standards in support of the FERC RM05-25-000 and RM05-17-000 (OATT Reform)<sup>27</sup></b>		
a) Develop version 2 business practice standards to better coordinate the use of the transmission system among neighboring transmission providers.  Status: Underway  Request R050004 was expanded to include the <a href="#">Order No. 890 (Docket Nos. RM05-17-000 and RM02-25-000)</a> , ( <a href="#">Order No. 890-A (Docket Nos. RM05-17-001, 002 and RM05-25-001, 002)</a> ), and <a href="#">Order No. 890-B (Docket Nos. RM05-17-03 and RM05-25-03)</a> “Preventing Undue Discrimination and Preference in Transmission Services”		
i) Group 3: Network Service On OASIS <sup>28</sup>		
1) Use of OASIS to Make Electronic Requests to Designate and Terminate Network Resource  Status: Underway	3 <sup>rd</sup> Q, 2011	OASIS
2) Ability to Query Requests to Designate and Terminate Network Resources and Allow for Queries of All Information Provided with Designation Requests  Status: Underway	3 <sup>rd</sup> Q, 2011	OASIS

<sup>26</sup> In some sections of WEQ 008 it appears that the standards are applicable to all of the Interconnections and other it appears that the standards are only applicable to the Eastern Interconnection. The title indicates the standards are applicable to the Eastern Interconnection.

<sup>27</sup> FERC Order No. 890, issued February 16, 2007 can be accessed from the following link - [http://www.naesb.org/doc\\_view4.asp?doc=ferc021607.doc](http://www.naesb.org/doc_view4.asp?doc=ferc021607.doc)

<sup>28</sup> Several group 3 items may be removed from this plan if the 4<sup>th</sup> quarter completion dates are met.

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	<b>Item Description</b>	<b>Completion<sup>1</sup></b>	<b>Assignment<sup>2</sup></b>
	3) Masking of Designated Network Resource Operating Restrictions and Generating Cost Information Status: Underway	3 <sup>rd</sup> Q, 2011	OASIS
	4) Procedural Requirements for Submitting Designations over new OASIS Functionality Status: Underway	3 <sup>rd</sup> Q, 2011	OASIS
	5) Specify How Designated Network Service Informational Postings are Posted on OASIS Status: Underway	3 <sup>rd</sup> Q, 2011	OASIS
	6) Develop standards for the treatment of OASIS Requests when the Customer Fails to Provide the Necessary Attestation Status: Underway	3 <sup>rd</sup> Q, 2011	OASIS
	7) Procedural Requirements for Submitting Both Temporary and Indefinite Terminations of Network Resources Status: Underway	3 <sup>rd</sup> Q, 2011	OASIS
	8) Procedures for Submitting and Processing Requests for Concomitant Evaluations of Transmission Requests and Temporary Terminations Status: Underway	3 <sup>rd</sup> Q, 2011	OASIS
ii)	Group 4: Pre-Emption; Request No. R05019		
	1. Pre-Emption Status: Not Started	4 <sup>th</sup> Q, 2011	OASIS
	2. Request No. R05019 Status: Not Started	4 <sup>th</sup> Q, 2011	OASIS
iii)	Group 5: Paragraph 1377 <sup>29</sup> – Group 5 work should precede group 4 work <sup>3</sup>		
	1) Paragraph 1377-Coordination of Requests Across Multiple Transmission Systems Status: Complete through the OASIS subcommittee, the WEQ EC to vote on June 30, 2011.	2 <sup>nd</sup> Q, 2011	OASIS

1. <sup>29</sup> Paragraph 1377 of FERC Order No. 890, issued February 16, 2007: The Commission agrees that transmission requests across multiple transmission systems should be coordinated by the relevant transmission providers. We will not, however, amend the pro forma OATT to require such coordination. Rather, we require transmission providers working through NAESB to develop business practice standards related to coordination of requests across multiple transmission systems. In order to provide guidance to NAESB, we will articulate the principles that should govern processing across multiple systems. All the transmission providers involved in a request across multiple systems should consider a request that requires studies across multiple systems to be a single application for purposes of establishing the deadlines for rendering an agreement for service, revising queue status, eliciting deposits and commencing service. In order to preserve the rights of other transmission customers with studies in the queue, the priority for the single application should be based on the latest priority across the transmission providers involved in the multiple system request. We note that regional entities like wesTTrans are already coordinating requests across multiple transmission systems and we believe such coordination is an acceptable solution to this issue.



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	<b>Item Description</b>	<b>Completion<sup>1</sup></b>	<b>Assignment<sup>2</sup></b>
2)	Re-Bid Of Partial Service across Multiple Transmission Providers' Systems  Status: Complete through the OASIS subcommittee, the WEQ EC to vote on June 30, 2011	2 <sup>nd</sup> Q, 2011	OASIS
3)	Group DNR requests from a system with point-to-point requests on other systems for synchronization  Status: Complete through the OASIS subcommittee, the WEQ EC to vote on June 30, 2011	2 <sup>nd</sup> Q, 2011	OASIS
iv)	Group 6: Miscellaneous (Paragraphs 1390 <sup>30</sup> and 1627 <sup>31</sup> of FERC Order No. 890)		
1)	Paragraph 1390 of Order 890 – Terminations related to: deficient requests, customer failure to pay required annual reservation fee, and customer modifications to applications which are meaningfully different.  Status: Not Started	1 <sup>st</sup> Q, 2012	OASIS
2)	Paragraphs 1627 of Order 890 – Posting of additional information on OASIS regarding firm transmission curtailments  Status: Not Started	1 <sup>st</sup> Q, 2012	OASIS

<sup>30</sup> Paragraph 1390 of FERC Order No. 890, issued February 16, 2007: We will not modify the pro forma OATT to address requests to allow the transmission provider to terminate idle transmission service requests. NAESB's business practice 001-4.11 allows the transmission provider to retract a request if the transmission customer does not respond to an acceptance within the time established in NAESB business practice standard 001-4.13. Therefore, we interpret TDU Systems comments to refer to circumstances when a transmission customer fails to respond to the transmission provider's request for additional information during the course of a request study. As discussed above, by the time the transmission provider offers a system impact study agreement, it should have all of the information that it needs to complete the study. Pursuant to section 17.4 of the pro forma OATT, the transmission provider can deem a transmission service request deficient if the transmission customer does not provide all of the information the transmission provider needs to evaluate the request for service. We will revise section 17.7 of the pro forma OATT so that the transmission provider is able to terminate a request for transmission service if a transmission customer that is extending the commencement of service does not pay the required annual reservation fee within 15 days of notifying the transmission provider that it would like to extend the commencement of service. We will not change the pro forma OATT to allow the transmission provider to terminate a transmission service request if the transmission customer changes its application for service. We believe the existing pro forma 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 customer is requesting transmission service that is meaningfully different than its initial request.

<sup>31</sup> Paragraph 1627 of FERC Order No. 890, issued February 16, 2007: We agree with suggestions for the posting of additional curtailment information on OASIS and, therefore, require transmission providers, working through NAESB, to develop a detailed template for the posting of additional information on OASIS regarding firm transmission curtailments. Transmission providers need not implement this new OASIS functionality and any related business practices until NAESB develops appropriate standards. These postings must include 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. This information is in addition to the Commission's existing requirements: (1) when any transmission is curtailed or interrupted, the transmission provider must post notice of the curtailment or interruption on OASIS, and the transmission provider must state on OASIS the reason why the transaction could not be continued or completed; (2) information to support any such curtailment or interruption, including the operating status of facilities involved in the constraint or interruption, must be maintained for three years and made available upon request to the curtailed or interrupted customer, the Commission's Staff, and any other person who requests it; and, (3) any offer to adjust the operation of the transmission provider's system to restore a curtailed or interrupted transaction must be posted and made available to all curtailed and interrupted transmission customers at the same time.

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Item Description	Completion <sup>1</sup>	Assignment <sup>2</sup>
3) Redispatch Cost Posting to allow for posting of third party offers of planning redispatch services. Status: Not Started	1 <sup>st</sup> Q, 2012	OASIS
b) Develop the needed business practices to support existing Request No. <a href="#">R05004</a> : 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 <sup>rd</sup> Q, 2011	OASIS
<b>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</b>		
a) Develop and/or maintain business practice standards as needed for OASIS and electronic scheduling. Specific items to address include:		
i) Network Services: Determine and develop needed business practice standards or other support is needed to support use of OASIS for Network Service transactions ( <a href="#">R04006E</a> ). (Related to AP 2(a)(iii)) <sup>3</sup> – to discuss at the WEQ EC meeting on whether this item can be closed out. Status: Completed by the OASIS Subcommittee and forwarded to the WEQ EC for vote on June 30, 2011.	3 <sup>rd</sup> Q, 2011	OASIS
ii) Registry (TSIN): Determine and develop needed business practice standards to support the registry functions currently supported by NERC ( <a href="#">R04037</a> , <a href="#">R06027</a> ) and transition the TSIN Registry from NERC to NAESB as the enhanced Electric Industry Registry (EIR). Status: Underway.	1 <sup>st</sup> Q, 2012	NAESB/NERC Administration, JESS
iii) Make remaining incremental enhancements to OASIS as an outgrowth of the NAESB March 29, 2005 conference on the future of OASIS ( <a href="#">R05026</a> ). Scoping <a href="#">statement</a> completed by SRS. There were a number of assignments from the Standards Request. The outstanding items are included below:		
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	2012	OASIS
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)	2012	OASIS
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)	2012	OASIS

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	<b>Item Description</b>	<b>Completion<sup>1</sup></b>	<b>Assignment<sup>2</sup></b>
iv)	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.  Status: Underway. Completion date dependent upon coordination activities with NERC, and Project 2008-12 is delayed by NERC due to other higher priority development	2012	JESS
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: Underway	3 <sup>rd</sup> Q, 2011	Board Certification Program Committee
ii)	Develop PKI standards for OASIS. Status: Not Started (upon initiation of this item by NAESB, a completion date will be determined)	2012	OASIS
iii)	Develop Industry Implementation Plan for meeting PKI Standard requirements for e-tagging. Status: Underway. Full e-Tag implementation (server & client side) is linked to the transition of the Registry from NERC to NAESB and NAESB implementation.	TBD – dependent on item above (i) and EIR	JESS
<b>4</b>	<b>Review and develop business practices standards to Demand Response, Demand Side Management and Energy Efficiency Programs</b>		
	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)	Review the NAESB Business Practices for Measurement and Verification of Wholesale Electricity Demand Response (WEQ-015) in conjunction with the IRC developed Demand Response Matrix and identify business practice requirements that could be improved or made clearer through the addition of specific technical detail. The wholesale and retail demand response work groups and the Smart Grid Standards Subcommittees should actively and timely communicate and coordinate work products to ensure consistency between the three work groups. Each work group should take into account the work products developed by the other.  Status: Completed	Phase 2 – 4 <sup>th</sup> Q 2010	WEQ Section of the Joint WEQ/REQ DSM-EE Subcommittee
b)	For each performance evaluation type/service type combination identified in WEQ-015, using the IRC matrix as a starting point, assess and determine what standards or guidelines, if any, should be developed to aid all participants in the use of measurement and verification methods for demand response programs in organized wholesale electric markets. If the determination is made that standards or guidelines will be developed, those items will be added as sub-items to 4(b).  Status: Completed	Phase 2 – 4 <sup>th</sup> Q 2010	WEQ Section of the Joint WEQ/REQ DSM-EE Subcommittee

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c) Coordinate glossary updates for business practice standards with the Retail Electric Quadrant Status: Ongoing	Ongoing	Joint WEQ/REQ DSM Subcommittee and WEQ SRS and Retail Glossary
d) Develop business practice standards used to measure and verify reductions in energy and demand from energy efficiency in wholesale and retail markets. <sup>3</sup> This includes developing 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: The WEQ EE standards are completed.	4 <sup>th</sup> Q, 2010  Retail Standards 4 <sup>th</sup> Q 2011	Joint WEQ/REQ DSM-EE Subcommittee
<b>5 Maintain existing body of Version 2.x standards</b>		
a) Make consistency changes to Version 2.2 standards as directed by the WEQ Leadership Committee on December 12, 2007 OASIS Consistency Changes (R08001, R08002, R08003, R08005) Status: Not Started (upon initiation of this item by NAESB, a completion date will be determined)	TBD	OASIS
b) 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 OASIS in May 2008.	TBD	OASIS
c) Correct WEQ 013-2.6.7.2. – Resale off OASIS (R08027) Status: Not Started	TBD	OASIS
d) Add language to WEQ-001-4 Online Negotiation and Confirmation process to clarify Table 4-3 (R09003) Status: Not Started	TBD	OASIS
e) Create a new OASIS mechanism that allows for the merger of like reservations without the use of the resale mechanism (R09015) Status: Not Started	TBD	OASIS
<b>6. Develop Smart Grid Wholesale and Retail Electric Standards</b> - The wholesale and retail demand response work groups and the Smart Grid task force should actively and timely communicate and coordinate work products to ensure consistency between the three work groups. Each work group should take into account the work products developed by the other.		
a) Develop requirements and use cases for PAP 03 – Pricing Model Phase 2 Status: Completed	4 <sup>th</sup> Q, 2010	Joint WEQ/REQ SGS Subcommittee
b) Develop requirements and use cases for PAP 04 – Scheduling Model Phase 2 Status: Completed	4 <sup>th</sup> Q, 2010	Joint WEQ/REQ SGS Subcommittee
c) Develop requirements and use cases for PAP 09 – Demand Response/Distributed Energy Resources Phase 2 Status: Completed	4 <sup>th</sup> Q, 2010	WEQ Section of the Joint WEQ/REQ SGS Subcommittee

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Item Description	Completion <sup>1</sup>	Assignment <sup>2</sup>
d) Develop standards to support PAP 10 – Standards Energy Usage Information		
i) Develop Information Model and related business practices Status: Completed	4 <sup>th</sup> Q, 2010	Joint WEQ/REQ PAP 10 SGS Subcommittee
ii) Develop standards to support PAP 10 – Standards Energy Usage Information, Phase 2, Harmonization with CIM and SEP 2.0 Status: Not Started, pending discussions with CIM and SEP 2.0	2011	Joint WEQ/REQ PAP 10 SGS Subcommittee
<b>7. Develop or modify standards to Support <a href="#">FERC Order No. 676-E</a>, (Docket No. RM 05-5-013)</b>		
a) Review standards 001-14.1.3 and 001-15.1.2 based on FERC Order No. 676-E (See ¶ 39 <sup>32</sup> ) Status: Not Started	4 <sup>th</sup> Q, 2011	OASIS
b) Develop standards to support the Transmission Provider right to reassess the availability of conditional firm (See ¶ 72 <sup>33</sup> ) Status: Not Started	4 <sup>th</sup> Q, 2011	OASIS
c) Prepare status reports every six months regarding the development of standards for the coordination of transmission service requests across multiple transmission systems (See ¶ 105 <sup>34</sup> ). This annual plan item is tied to Annual Plan Item 2(a)(iii) Status: Underway – first report filed.	Ongoing	NAESB Office

<sup>32</sup> 39. In regards to Entergy’s question of whether the transmission provider’s calculated and posted available flowgate capability values should be used to fulfill the posting requirements set forth in Standard 001-14 and 001-15 in instances where there is no requirement to convert this calculation to available transfer capability values, we agree with Entergy that this requirement can be met by the transmission provider posting its available flowgate capability values. As to EPSA’s argument that Standard 001-15 falls short of the goals of Order No. 890, we find that, with the exception of Standard 001-15.1.2, compliance with Standard 001-15 provides all of the information required by Order No. 890. However, Standards 001-14.1.3 and 001-15.1.2 permit transmission providers to post an available transfer capability change narrative within five business days of meeting the criteria under which a narrative is required to be posted. In Order No. 890, the Commission rejected calls for delays prior to posting data and required posting as soon as possible. We do not find the NAESB standard meets this criterion and therefore decline to incorporate Standards 001-14.1.3 and 001-15.1.2 by reference. Transmission providers must post their narratives as soon as feasibly possible. Posting within one day would appear in most cases to be reasonable.

<sup>33</sup> 72. However, we reiterate here the Commission’s finding in Order No. 890 that a transmission provider is permitted to extend its right to reassess the availability of conditional firm service. Since the Version 002.1 Standards do not specifically address this issue, we would ask the industry, working through NAESB, to continue to look at additional business practice standards facilitating a transmission provider’s extension of its right to perform a reassessment

<sup>34</sup> 105. We agree that insufficient progress has been made on this issue. While we acknowledge that development of standards addressing this issue is included in NAESB’s 2009 WEQ Annual Plan, we nevertheless urge NAESB to address this issue as soon as possible. Accordingly, we request that NAESB provide the Commission with a status report concerning its progress on this issue every six months, counting from the date this final rule is published in the Federal Register, until NAESB’s adoption of the applicable standard(s).

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**PROVISIONAL ITEMS**

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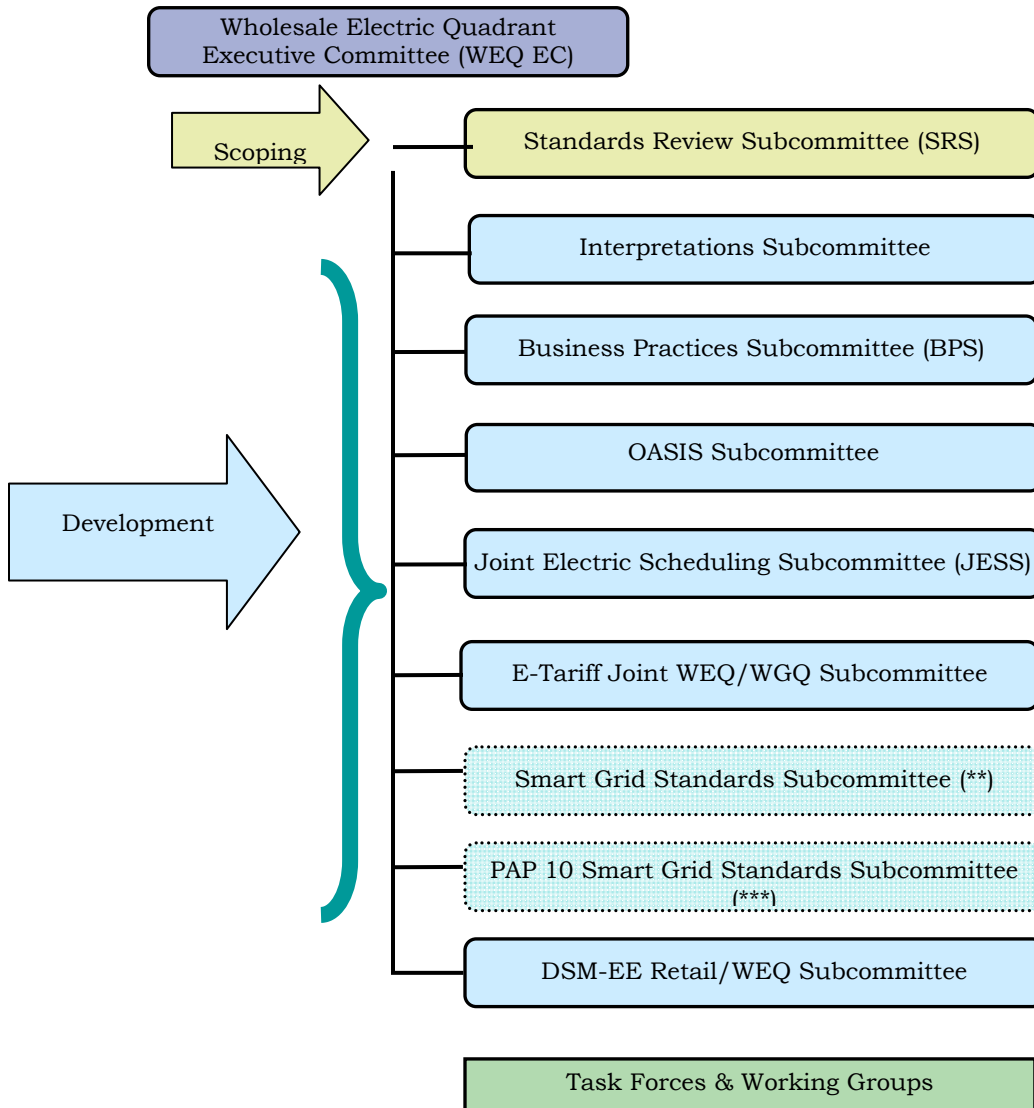
- 1 Develop and or modify business practices related to support of NERC effort on the NERC Resources and Transmission Adequacy (Project 2009-05 Resource Adequacy Assessment).
- 2 Develop business practices for allocating capacity among requests received during a submittal window Order 890-A ([Docket Nos. RM05-17-001, 002 and RM05-25-001, 002](#) - Paragraph 805)<sup>35</sup>.
- 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<sup>36</sup> (Phase 2) in concert with NERC, which may include alternative congestion management procedures<sup>4</sup>. Work on this activity is dependent on completing 2010 WEQ Annual Plan 1.a (Parallel Flow Visualization/Mitigation for Reliability Coordinators in the Eastern Interconnection - Phase 1).
- 5 Develop complementary standards that align with NERC Project 2008-01 Voltage and Reactive Control, for which a white paper is expected after the SAR is authorized to proceed by the NERC Standards Committee.
- 6 Determine NAESB action needed to support FERC Action Plan for Smart Grid Technology.
- 7 Develop business practice standards for cap and trade programs for greenhouse gas
- 8 Conduct assessment to determine if Electric Industry Requirements documented in WEQ-011 Gas / Electric Coordination should be considered reliability requirements and transition to NERC.
- 9 Develop needed business practice standards for organization/company codes for NAESB standards – and address current issues on the use of DUNs numbers. Common code usage is linked to the transition of the Registry from NERC to NAESB.
- 10 Review the need for, and develop standards where appropriate, in response to issues raised by FERC’s National Action Plan on Demand Response.
- 11 Develop, modify or delete business practices to support Time Error and Inadvertent (BAL-004 and BAL-006) resulting from the NERC field test under NERC project (NERC Project 2010-14).
12. Coordinate standards development with the NERC Balancing Authority Reliability Based Controls Standards Drafting Team (BARCSDT- created in July 2010) regarding DCS and AGC (BAL-002 and BAL-005) which may require changes to NAESB WEQ standards.

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<sup>35</sup> 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.

<sup>36</sup> Phase 2 of the Parallel Flow Visualization looks at developing options for and reporting of the most cost effective alternatives to achieve curtail obligations assigned during Phase 1.”

**WHOLESALE ELECTRIC QUADRANT EXECUTIVE COMMITTEE AND SUBCOMMITTEE STRUCTURE**



**NAESB WEQ EC and Subcommittee Leadership:**

Executive Committee (EC): Kathy York (Chair) and James Castle (Vice Chair)

Standards Review Subcommittee (SRS): Narinder Saini, Ed Skiba

Interpretations Subcommittee: Ed Skiba

Business Practices Subcommittee (BPS) & Time and Inadvertent Management Task Force (TIMTF): Ed Skiba, Narinder Saini

Open Access Same Time Information System (OASIS) Subcommittee (OS): Paul Sorenson, J.T. Wood, Alan Pritchard

Joint Electric Scheduling Subcommittee (JESS): Bob Harshbarger (NAESB), Clint Aymond (NERC)

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

Demand Side Management-Energy Efficiency (DSM-EE) REQ/WEQ Subcommittee: Ruth Kiselewich (Retail), Roy True and Paul Wattles (WEQ)

(\*\*) The Smart Grid Standards Subcommittee is a joint group of the retail electric and wholesale electric quadrants with other standards development groups such as OASIS (Organization for the Advancement of Structured Information Standards, not Open Access Same Time Information Systems related to NAESB standards and FERC actions), CalConnect, FIX and UCAlug, among others. Direction may be given from NIST, DoE or FERC and the group reports jointly to the NAESB Board Smart Grid

Strategic Steering Committee and the WEQ and REQ ECs. The group is chaired by Joe Zhou, Wayne Longcore and Robert Burke.

(\*\*\*) The PAP 10 Smart Grid Standards Subcommittee is a joint group of the retail electric and wholesale electric quadrants with other standards development groups such as OASIS, UCAIug, OpenADE, ZigBee, ASHRAE, EIS Alliance, NARUC and includes other groups. Direction may be given from NIST, DoE or FERC and the group reports jointly to the NAESB Board Smart Grid Strategic Steering Committee and the WEQ and REQ ECs. The group is chaired by Phil Precht, Cathy Wesley, Sharon Dinges, David Kaufman, Brad Ramsay, Tobin Richardson and Ed Koch.

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**End Notes WEQ 2011 Annual Plan:**

<sup>1</sup> Dates in the completion column are by end of the quarter for completion by the assigned committee, sub-committee or task force. 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.

<sup>2</sup> The assignments are abbreviated. The abbreviations and sub-committee structure can be found at the end of the annual plan document.

<sup>3</sup> Energy efficiency may be a wholesale product, such as capacity. Energy efficiency in retail markets may be from individual energy efficiency measures at the project level or a portfolio of projects that make up an energy efficiency program.

<sup>4</sup> For additional information, please see comments submitted by PJM and Midwest ISO for this Annual Plan Item:  
[http://www.naesb.org/pdf3/weq\\_aplan102907w1.pdf](http://www.naesb.org/pdf3/weq_aplan102907w1.pdf).



## **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.

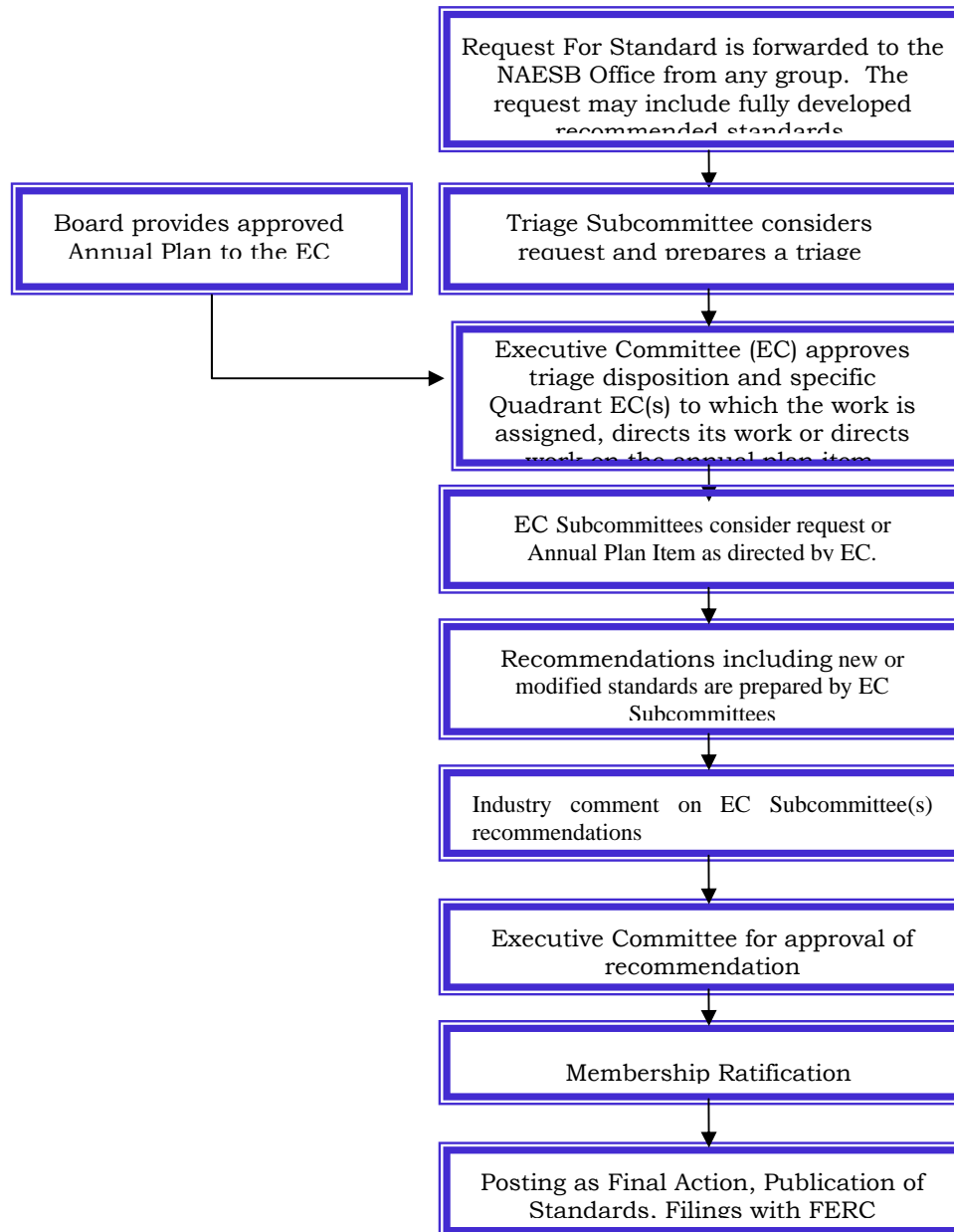
Once the triage process is completed, the subcommittees—more than one are normally involved in standards recommendations—review the request, compare it to existing standards, and prepare recommendations that may take the form of new or modified standards or interpretations. Participation in EC subcommittees 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.<sup>37</sup> This process requires that the appropriate NAESB Subcommittee and NERC Standards drafting team work together to develop reliability standards and business practices.

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.

### Accessibility of Standards and Work Products

The NAESB standards and protected work products are accessible to members at no cost as a benefit of their membership. Non-members can purchase the standards as a full version, or they can purchase individual final actions. Non-members can also access the standards at no cost by requesting an evaluation copy. NAESB standards and protected work products are copyrighted. Non-members can download a NAESB materials order form from the NAESB web site for ordering standards or for instructions on accessing standards for evaluation.

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<sup>37</sup> 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](http://www.naesb.org/doc_view2.asp?doc=ferc021706.pdf).