**1. RECOMMENDED ACTION: EFFECT OF EC VOTE TO ACCEPT RECOMMENDED ACTION:**

|  |  |  |  |
| --- | --- | --- | --- |
| X | Accept as requested | X | Change to Existing Practice |
|  | Accept as modified below |  | Status Quo |
|  | Decline |  |  |

**2. TYPE OF DEVELOPMENT/MAINTENANCE**

|  |  |  |  |
| --- | --- | --- | --- |
| **Per Request:** | | **Per Recommendation:** | |
|  | Initiation |  | Initiation |
| X | Modification | X | Modification |
|  | Interpretation |  | Interpretation |
|  | Withdrawal |  | Withdrawal |
|  |  |  |  |
| X | Principle | X | Principle |
| X | Definition | X | Definition |
| X | Business Practice Standard | X | Business Practice Standard |
|  | Document |  | Document |
|  | Data Element |  | Data Element |
|  | Code Value |  | Code Value |
|  | X12 Implementation Guide |  | X12 Implementation Guide |
|  | Business Process Documentation |  | Business Process Documentation |

**3. RECOMMENDATION**

**SUMMARY:**

The RMQ Business Practices Subcommittee submits this Recommendation for 2016 Retail Annual Plan Item 1.a – Book 11 – Enrollment, Drop and Account Information Change Using a Registration Agent. This Recommendation also completes 2015 Retail Annual Plan Item 4.a.ii – Retail Net Metering in Book 11 by specifying a Retail Net Metering identifier as a business element in several of the defined transactions in the Model Business Practices. A large number of revisions have been made to existing Model Business Practices to update the processes to current conditions. In addition, several new Model Business Practices have been added to name various transactions and specify a number of business elements in the transactions. This also includes the addition of 3 new sections for ESI ID Retirement, Continuous Service Agreement Set-up, and Continuous Service Agreement Termination. Revised Process Flows for the many revisions are also included.

**Recommended Standards:**

The recommended Model Business Practices are included in this Recommendation as three (3) attachments:

Attachment 1 is the revised Model Business Practices in Redlined format <https://www.naesb.org/member_login_check.asp?doc=retail_2016_api_1a_3ai_rec_attach1_022416.docx> ; *(as revised and approved by the RMQ EC on February 24, 2016)*

Attachment 2 is the revised Model Business Practices in a Clean format <https://www.naesb.org/member_login_check.asp?doc=retail_2016_api_1a_3ai_rec_attach2_022416.docx> ; and

Attachment 3 is the revised Process Flows <https://www.naesb.org/member_login_check.asp?doc=retail_2016_api_1a_3ai_rec_attach3_022416.ppt> .

**4. SUPPORTING DOCUMENTATION**

**a. Description of Request:**

2016 Retail Annual Plan Item 1.a – Enrollment, Drop and Account Information Change Using a Registration Agent

2016 Retail Annual Plan Item 3.a.i– Customer Enrollment, Drop, and Account Information Change Using a Registration Agent

**b. Description of Recommendation:**

The Retail BPS submits this Recommendation for 2016 Retail Annual Plan Item 1.a – Enrollment, Drop and Account Information Change Using a Registration Agent. This Recommendation also includes modifications in response to 2016 Retail Annual Plan Item 3.a.i– Customer Enrollment, Drop, and Account Information Change Using a Registration Agent (Retail Net Metering). Modifications are being recommended to several Model Business Practices. The recommendation specifies a Retail Net Metering identifier as a business element in several of the defined transactions in the Model Business Practices. A large number of revisions have been made to existing Model Business Practices to update the processes to current conditions. Finally, the new sections added to this recommendation include: RXQ. 11.3.9 ESI ID Retirement (to be utilized when the meter and service have been removed), RXQ.11.3.10 Continuous Service Agreement Setup, RXQ.11.3.11 Continuous Service Agreement Termination, and RXQ.11.3.2 Mass Transition (to identify the processes to be used for the transfer of the responsibility for providing energy to a group of Retail Customers from one Market Participant to another). A Redline and a Clean version of the recommended changes, along with the modified Book 11 Process Flows, have been included as attachments.

**c. Business Purpose:**

See above.

**d. Commentary/Rationale of Subcommittee(s)/Task Force(s):**

The Minutes of all Retail BPS conference calls and face-to-face meetings are posted on the NAESB website. The modifications included in this recommendation were discussed during the following:

[April 27-28, 2015](https://www.naesb.org/pdf4/retail_bps042715fm.doc) Face-to-Face Meeting

June 17, 2015 Conference Call

[July 8, 2015](https://www.naesb.org/pdf4/retail_bps070815fm.doc) Conference Call

[August 17-18, 2015](https://www.naesb.org/pdf4/retail_bps081715fm.doc) Face-to-Face Meeting

[September 17, 2015](https://www.naesb.org/pdf4/retail_bps091715fm.doc) Conference Call

[October 19-20, 2015](https://www.naesb.org/pdf4/retail_bps101915fm.doc) Face-to-Face Meeting

December 15, 2015 Conference Call

January 20, 2016 Conference Call

During the January 20, 2016 conference call, the modifications included in this Recommendation were voted out of the Retail BPS Subcommittee.