**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:** | |
| X | Initiation | X | Initiation |
|  | Modification |  | 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 Joint Business Practices Subcommittee (BPS) and the DSM-EE Task Force submit this Recommendation to initiate a new Book 27 for Enrollment, Drop and Account Information Change for Demand Response Programs in a Registration Agent Marketplace. This is in response to 2017 Retail Annual Plan item 1(i). As the Joint Subcommittees began to review the existing Book 24 – Enrollment, Drop and Account Information Change, it became clear that there are marked differences between the processes in the Registration Agent marketplace and other markets. Therefore, a new Book was developed focused on the Registration Agent marketplace. This new Book does not address the situation where an individual Retail Customer contacts either the Registration Agent or Distribution Company to enroll in a Demand Response program. Rather, it addresses the processes for a Demand Response Service Provider to enroll or Drop a Retail Customer from their Demand Response program. In addition to the Model Business Practices, process flows (Models) have also been developed.

**Recommended Standards:**

Attachment 1 are the new Model Business Practices: <https://www.naesb.org/member_login_check.asp?doc=retail_2017_api_1i_rec_attach1.docx>

Attachment 2 are the new process flows (Models) to match the Model Business Practices: <https://www.naesb.org/member_login_check.asp?doc=retail_2017_api_1i_rec_attach2.pptx>

**4. SUPPORTING DOCUMENTATION**

**a. Description of Request:**

Retail 2017 Annual Plan Item 1(i) – Review and update all existing Model Business Practices, filling in any gaps that may exist and making the language consistent throughout all Books. Book 27 – Enrollment, Drop and Account Information Change for Demand Response Programs in a Registration Agent Marketplace.

**b. Description of Recommendation:**

The Joint Business Practices Subcommittee (BPS) and the DSM-EE Task Force submit this Recommendation to initiate a new Book 27 for Enrollment, Drop and Account Information Change in a Registration Agent Marketplace. This is in response to 2017 Retail Annual Plan item 1(i). As the Joint Subcommittees began to review the existing Book 24 – Enrollment, Drop and Account Information Change, it became clear that there are marked differences between the processes in the Registration Agent marketplace and other markets. Therefore, a new Book was developed focused on the Registration Agent marketplace. This new Book does not address the situation where an individual Retail Customer contacts either the Registration Agent or Distribution Company to enroll in a Demand Response program. Rather, it addresses the processes for a Demand Response Service Provider to enroll or Drop a Retail Customer from their Demand Response program. In addition to the Model Business Practices, process flows (Models) have also been developed.

**c. Business Purpose:**

See above Description

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

The Minutes of all meetings and Conference Calls where the new Book 27 were discussed are posted on the NAESB website. Book 27 was discussed during the following meetings and conference calls:

August 15, 2016 Conference Call

September 22, 2016 Conference Call

October 24-25, 2016 Face-to-Face Meeting

December 12, 2016 Conference Call

During the December 12, 2016 Conference Call, the new Book 27 was unanimously voted out of the Joint Subcommittees.