



## **North American Energy Standards Board**

1301 Fannin, Suite 2350, Houston, Texas 77002  
Phone: (713) 356-0060, Fax: (713) 356-0067, E-mail: [naesb@naesb.org](mailto:naesb@naesb.org)  
Home Page: [www.naesb.org](http://www.naesb.org)

---

### **COPYRIGHT NOTICE**

The following North American Energy Standards Board (NAESB) final action or published standards is protected by federal copyright and a limited waiver has been granted for your access for **evaluation purposes only**. It should not be distributed or shared in any manner other than to task force members of the Illinois Commerce Commission for their review and evaluation. If you are not a member of NAESB and would like to use the following final action or published standards for purposes other than evaluation, please contact the NAESB office at 713-356-0060 or [naesb@naesb.org](mailto:naesb@naesb.org) for permission or purchase.

---



**NAESB RETAIL FINAL ACTION RATIFIED February 8, 2008**

**For Quadrant: REQ and RGQ**

**Requesters: Joint REQ/RGQ BPS**  
**Request No.: 2007 Annual Plan Item No. 3a(iii)**  
**Request Title: Account Information Change**

**1. RECOMMENDED ACTION:**

- Accept as requested
- Accept as modified below
- Decline

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

- Change to Existing Practice
- Status Quo

**2. TYPE OF DEVELOPMENT/MAINTENANCE**

**Per Request:**

- Initiation
- Modification
- Interpretation
- Withdrawal
- Principle
- Definition
- Business Practice Standard
- Document
- Data Element
- Code Value
- X12 Implementation Guide
- Business Process Documentation

**Per Recommendation:**

- Initiation
- Modification
- Interpretation
- Withdrawal
- Principle
- Definition
- Business Practice Standard
- Document
- Data Element
- Code Value
- X12 Implementation Guide
- Business Process Documentation

**3. RECOMMENDATION**

**SUMMARY:**

The Joint Retail Electric and Retail Gas Quadrant's Business Practices Subcommittees submit this Recommendation for REQ/RGQ 2007 Annual Plan Item No. 3a(iii) – Account Information Change Model Business Practices. These Model Business Practices detail the process for changing information on a Customer's account. The transaction request to change a Customer's account information may be submitted by either the Supplier or the Distribution Company.

**RECOMMENDED STANDARDS:**



**NAESB RETAIL FINAL ACTION RATIFIED February 8, 2008**

**For Quadrant: REQ and RGQ**

**Requesters: Joint REQ/RGQ BPS**

**Request No.: 2007 Annual Plan Item No. 3a(iii)**

**Request Title: Account Information Change**

**RXQ.10.3.5 Account Information Change – Submitted by Supplier**

RXQ.10.3.5.1 Account Information Change Requests should be submitted by Suppliers for the purposes described in the Governing Documents (typically, billing option, rate change, Supplier account number change, etc.).

RXQ.10.3.5.2 The Supplier should send an Account Information Change Request to the Distribution Company via Uniform Electronic Transaction within the required timeframe prior to the desired Account Information Change Effective Date.

RXQ.10.3.5.3 To enable the Distribution Company to confirm the Customer account, an Account Information Change Request submitted by a Supplier should contain the Distribution Company account number. In addition, one or more of the following elements may be required:

- Customer name;
- five digit zip code of service address, or;
- other elements as determined by the Applicable Regulatory Authority.

RXQ.10.3.5.4 In addition to the required confirmation elements, an Account Information Change Request submitted by a Supplier should contain the data elements found in RXQ.10.6. At a minimum, the following Customer account information should be included:

- Distribution Company account number (the unique Customer Identifier);
- Customer name;
- Account Information Change indicator;
- Account Information Change reason code (if required);
- account information to be changed;
- type of service (gas or electric), and;
- Supplier account number (if provided by Supplier).

RXQ.10.3.5.5 The Distribution Company should send an Account Information Change Confirmation to the Supplier via Uniform Electronic Transaction within one (1) Business Day of receiving the Supplier's Account Information Change Request if all of the following conditions exist:

- the Customer account is confirmed;
- the Account Information Change Request has the required elements, and;
- the Customer is currently served by the Supplier.



**NAESB RETAIL FINAL ACTION RATIFIED February 8, 2008**

**For Quadrant: REQ and RGQ**

**Requesters: Joint REQ/RGQ BPS**

**Request No.: 2007 Annual Plan Item No. 3a(iii)**

**Request Title: Account Information Change**

RXQ.10.3.5.6 The Distribution Company should send an Account Information Change Rejection containing the applicable rejection reason code to the Supplier via Uniform Electronic Transaction within one (1) Business Day of receiving the Supplier's Account Information Change Request if any of the following conditions exist:

- the Customer account is not confirmed;
- the Account Information Change Request does not have the required elements, or;
- Customer is not served by the Supplier.

RXQ.10.3.5.7 An Account Information Change Confirmation submitted by the Distribution Company should contain the data elements found in RXQ.10.6. At a minimum, the following Customer account information should be included:

- Customer name;
- Account Information Change Confirmation indicator;
- Supplier account number, (if provided by Supplier);
- Distribution Company account number (the unique Customer identifier) and;
- scheduled Account Information Change Effective Date.

RXQ.10.3.5.8 An Account Information Change Rejection submitted by the Distribution Company should contain the data elements found in RXQ.10.6. At a minimum, the following Customer account information should be included:

- Customer name;
- Account Information Change Rejection indicator;
- rejection reason code;
- Supplier account number, (if provided by Supplier), and;
- Distribution Company account number (the unique Customer identifier).



**NAESB RETAIL FINAL ACTION RATIFIED February 8, 2008**

**For Quadrant: REQ and RGQ**

**Requesters: Joint REQ/RGQ BPS**

**Request No.: 2007 Annual Plan Item No. 3a(iii)**

**Request Title: Account Information Change**

**RXQ.10.3.6 Account Information Change – Submitted by Distribution Company**

RXQ.10.3.6.1 Account Information Change Requests should be submitted by Distribution Companies for the purposes described in the Governing Documents (typically, billing address, meter exchange, Distribution Company account number, meter read cycle, capacity and transmission obligation, etc.)

RXQ.10.3.6.2 The Distribution Company should send an Account Information Change Request to the Supplier via Uniform Electronic Transaction within the required timeframe, containing the Account Information Change Effective Date.

RXQ.10.3.6.3 Where the Supplier is required to respond to an Account Information Change Request, the Supplier should send an Account Information Change Confirmation to the Distribution Company via Uniform Electronic Transaction within one (1) Business Day of receiving the Distribution Company's Account Information Change Request if the Customer account is confirmed by the Supplier.

RXQ.10.3.6.4 A Supplier should reject an Account Information Change Request if the Supplier determines that the Customer account number in the Account Information Change Request is not valid. If the Customer account number is not valid, the Supplier should send the resulting Account Information Change Rejection to the Distribution Company via Uniform Electronic Transaction within one (1) Business Day of receiving the Distribution Company's Account Information Change Request.

RXQ.10.3.6.5 An Account Information Change Request submitted by the Distribution Company should contain the data elements found in RXQ.10.6. At a minimum, the following Customer account information should be included:

- Distribution Company account number (the unique Customer identifier);
- Customer Name;
- Account Information Change indicator;
- Account Information Change reason code (if required);
- account information to be changed;
- type of service (gas or electric);
- Supplier account number (if provided by Supplier), and;
- scheduled Account Information Change Effective Date.



**NAESB RETAIL FINAL ACTION RATIFIED February 8, 2008**

**For Quadrant: REQ and RGQ**

**Requesters: Joint REQ/RGQ BPS**

**Request No.: 2007 Annual Plan Item No. 3a(iii)**

**Request Title: Account Information Change**

RXQ.10.3.6.6 An Account Information Change Confirmation submitted by a Supplier should contain the data elements found in RXQ.10.6. At a minimum, the following Customer account information should be included:

- Customer name;
- Account Information Change Confirmation indicator;
- Supplier account number, (if provided by Supplier), and;
- Distribution Company account number (the unique Customer identifier).

RXQ.10.3.6.7 An Account Information Change Rejection submitted by a Supplier should contain the data elements found in RXQ.10.6. At a minimum, the following Customer account information should be included:

- Customer name;
- Account Information Change Rejection indicator;
- rejection reason code;
- Supplier account number, (if provided by Supplier), and;
- Distribution Company account number (the unique Customer identifier).

FOR EVALUATION PURPOSES ONLY



**NAESB RETAIL FINAL ACTION RATIFIED February 8, 2008**

**For Quadrant: REQ and RGQ**

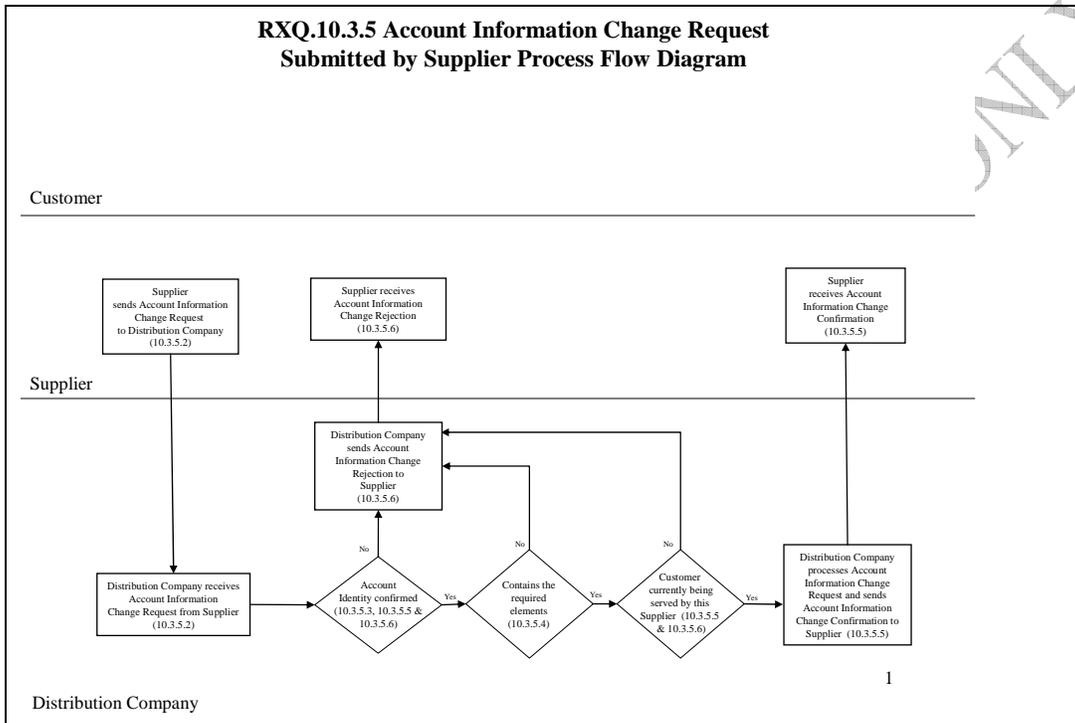
**Requesters: Joint REQ/RGQ BPS**

**Request No.: 2007 Annual Plan Item No. 3a(iii)**

**Request Title: Account Information Change**

**RXQ.10.4 Models**

**RXQ.10.4.5 Account Information Change Submitted by Supplier Process Flow Diagram**



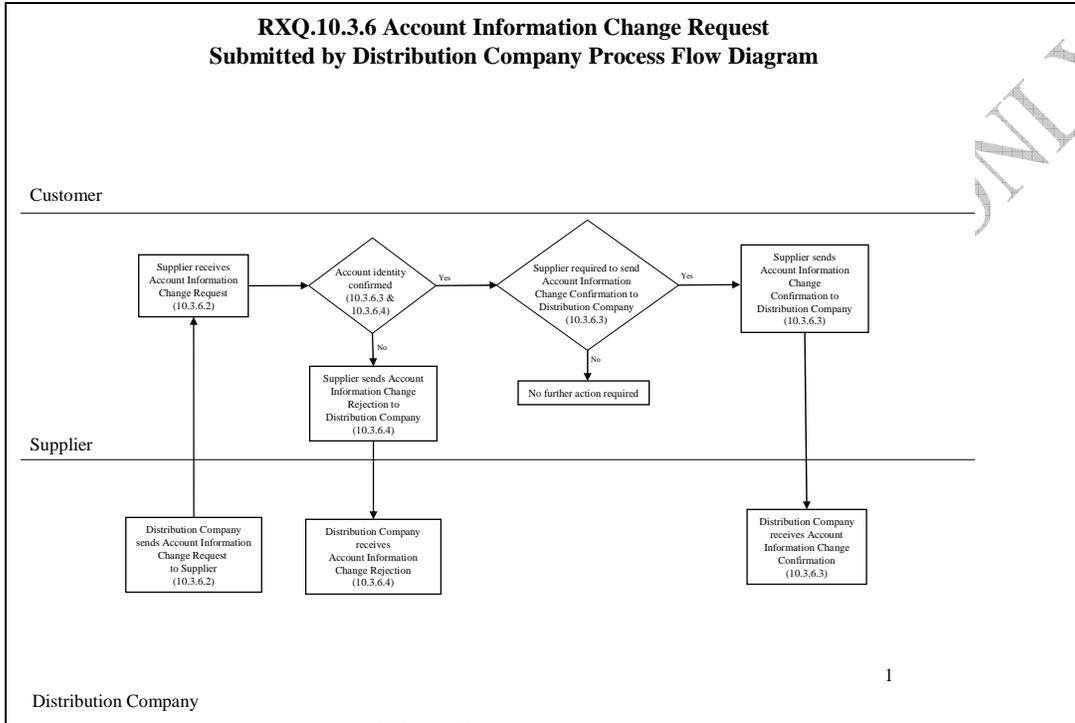


**NAESB RETAIL FINAL ACTION RATIFIED February 8, 2008**

**For Quadrant: REQ and RGQ**

**Requesters: Joint REQ/RGQ BPS**  
**Request No.: 2007 Annual Plan Item No. 3a(iii)**  
**Request Title: Account Information Change**

**RXQ.10.4.6 Account Information Change Submitted by Distribution Company**  
**Process Flow Diagram**





**NAESB RETAIL FINAL ACTION RATIFIED February 8, 2008**

**For Quadrant: REQ and RGQ**

**Requesters: Joint REQ/RGQ BPS**

**Request No.: 2007 Annual Plan Item No. 3a(iii)**

**Request Title: Account Information Change**

FOR EVALUATION PURPOSES ONLY