

Appendix A

Service Across Multiple Transmission Systems (SAMTS) Reference Document

A. SAMTS Groups

1. A SAMTS TSR is part of a coordinated group involving one or more TPs. BPAT requires multiple TPs to be involved for a coordinated group.
2. Eligible requests include LTF-Yearly PTP, STF-Monthly PTP, NF-Monthly PTP, LFT-Yearly NT, NF-Monthly NT or NF-Monthly NT.
3. BPAT will implement SAMTS for LTF-Yearly PTP and LTF-Yearly NT only. Other products will be added as functionality becomes available to BPAT.
4. The customer will have 24 hours from the TSR queue time to update the CG Status field to ATTESTED.
5. The TP cannot update the status to CR_COUNTEROFFER or CR_ACCEPTED until the customer updates the status to ATTESTED. The system is set up to automatically change status to INVALID if the customer does not attest within the first 24 hours.
6. The TP can, however, change the status of the TSR to a dead state at any time per BPAT's business practices. For example, the TSR can be marked as INVALID if there is no Sale Ref identified. The TSR can also be marked as REFUSED if there is no ATC.

B. Creating a SAMTS Group

1. The customer creates multiple TSRs in OASIS that are to be joined into a group. Within each TSR, the CG Status must be set to PROPOSED (the initial status) and the TSR must be Preconfirmed (an error will appear if a PROPOSED TSR is not Preconfirmed).

Note: The CG_Status cannot be added after the TSR is submitted.

Reservation Entry Form

BPAT Time Zone: PD

Pricing: BPAT

Update BPAT Info

BPAT | Select Provider | Scenario Analyzer | Enter TSR | Clear Form | Save As Template | Close

Seller	Source Sink *	POR POD	Service *	Request Type	Start	Stop	MW	Bid Price
BPAT	CALIFOREBRDR JOHNDAYINT1500	COB JOHNDAY	LTF-YEARLY PTP	ORIGINAL	06/01/2015 00:00	06/01/2016 15:00	PD	1479.0000

Customer: APSE | Path: Preconfirmed

Rollover Waived: []

CG Status: PROPOSED

Posting Ref: []

Sale Ref: 12345

Reservation Profile: [] 25Hr [] 24Hr [x] H [] D [] W [] M [] Y [] Other [] Peak

Create

2. Note that there are new columns available in the OASIS reservation display, CG Status and CG Deadline. They can be added to the reservation display via the Columns button. They can also be used to filter TSRs via the More Filtering button.
 - a. CG Status will either be PROPOSED or ATTESTED.
 - i. PROPOSED is initially selected by the customer to alert BPAT that this request is part of a SAMTS group.
 - ii. ATTESTED is selected by the customer within the Customer Update screen (step 12); it indicates that contiguity requirements have been met.
 - b. CG Deadline indicates the deadline for the customer to attest the group.
 - i. The deadline will be 24 hours from the request's QUEUED time.
 - ii. It will be automatically set by OASIS.

Reservation Summary: ALL

Customer: ALL | Incr: ALL | Path: | POR: ALL | Src: | Use DST:

TP: ALL | Class: ALL | Status: ALL | POD: ALL | Snk: | Enter

Seller: ALL | Type: ALL | Time: Queued | User Range: | Req Type: ALL | Ref: | Enter

New TSR | More Filtering | **User Range** | **Columns** | Save Query | Refresh **Disabled**

AFC/Flowgate Reports | Hourly Summary | Spreadsheet | TS Metrics | TransAssign | Full Transfer | COL STRIP Portal

Selected time range: 2015-05-05 00:00:00 PD to 15:00:00 PD

Assign Ref ↑	Queued Time	Request Type	CG Deadline	CG Status	Rollover Waived	Concom Eval Flag	Customer	MW Req	MW Grant	POR	POD	Service
69820495	2015-05-05 14:44:53 PD	ORIGINAL	2015-05-06 14:44:05 PD	PROPOSED			APSE	1		BC US BORDER	BIGBEND	F HOURLY PTP
69820494	2015-05-05 14:44:05 PD	ORIGINAL	2015-05-06 14:44:05 PD	PROPOSED			APSE	1		COB	JOHNDAY	LTF-YEARLY PTP
69820493	2015-05-05 14:43:29 PD	ORIGINAL	2015-05-06 14:43:29 PD	PROPOSED			APSE	1		COB	JOHNDAY	LTF-YEARLY PTP

3. Click the PROPOSED hyperlink in the CG Status column to open the New Coordinated Group window. These steps will need to be repeated for each TSR to be grouped together (YEARLY and MONTHLY only).

New Coordinated Group

TP	AssignRef	Increment	Class	Type	Window	Period	Subclass
BPAT	69820545	YEARLY	FIRM	POINT_TO_POINT	EXTENDED	FULL_PERIOD	

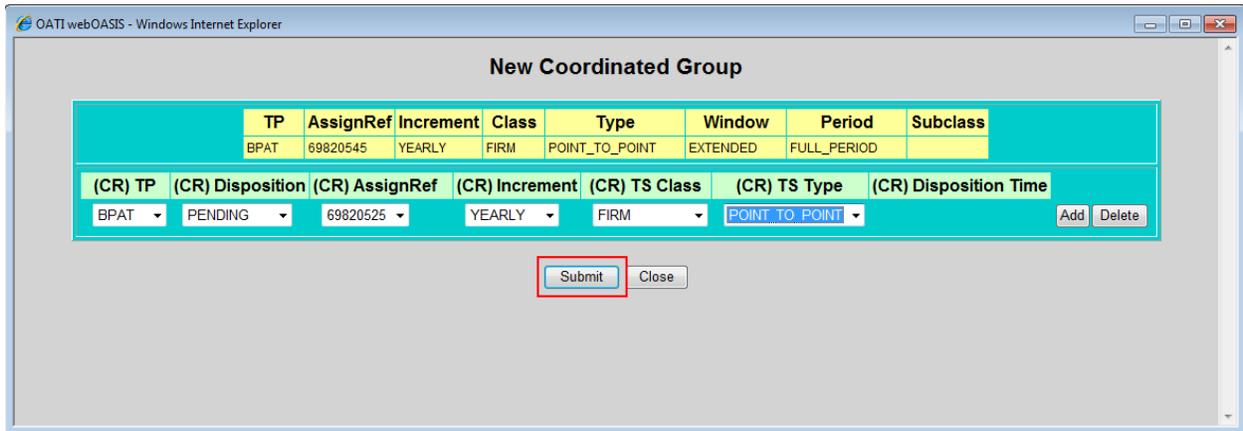
(CR) TP: BPAT | (CR) Disposition: PENDING | (CR) AssignRef: | (CR) Increment: | (CR) TS Class: | (CR) TS Type: | (CR) Disposition Time: | Add | Delete

Submit | Close

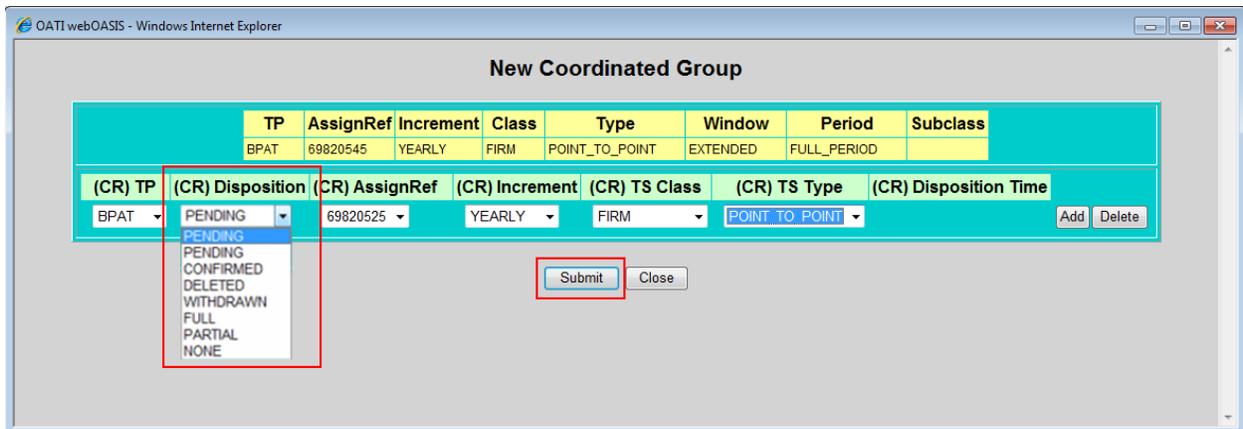
4. Select a TP in the (CR) TP field. Note that the default TP is BPAT. The user may add a TP by selecting "Other..." from the dropdown menu and manually entering the TP's acronym.
5. Select a (CR) Disposition status from the dropdown menu.
 - a. PENDING – select this status if entering a TSR that is part of a CG group on another TP's system.

- b. CONFIRMED – select this status if including an existing reservation as part of the CG group. This option will not be available when the TSR is ATTESTED.
 - c. DELETED - select this if the TSR needs to be removed from the CG group. This option will not be available when the TSR is ATTESTED.
6. Enter an AREF into the (CR) AssignRef field.
 7. Select an increment from the (CR) Increment dropdown menu.
 8. Select a class from the (CR) TS Class dropdown menu.
 9. Select a type from the (CR) TS Type dropdown menu.
 10. Click the Add button to add additional TSRs to the coordinated group.
 11. Click the Delete button to remove extra rows as needed. The customer will need to select DELETED from the (CR) Disposition dropdown to remove a TSR from the group.
 12. Repeat steps 4 -9 as needed for each additional TSR to be included in the coordinated group.

Note: A coordinated group is not considered valid until there are at least 2 different TPs within the group. At least one of the (CR) AssignRefs must be PENDING when attesting the group.



13. Click Submit after adding all desired TSRs.
14. Update the (CR) Disposition as appropriate for the TSR(s) in question. Click Submit when finished.



- Once contiguity requirements have been met, enter each TSR and click Customer Update button. Change the CG Status to ATTESTED. Click Submit Changes when finished.

Customer TSR Update 69820016 QUEUED

Status Comments

Customer Comments

Anc-Link

Status Notification

Preconfirmed Yes

New Status

CG Status

- PROPOSED
- ATTESTED

Reservation Profile							
Row	Start	Stop	MW Req	MW Grant	MWH	Bid Price	Offer Price
1	04/01/2015 00:00 PD	04/01/2016 00:00 PD	5.00		43920	1479.00	
Profile Total:					43920		

This will change the CG Status in the TSR to ATTESTED. This must be completed prior to the 24 hour CG_Deadline; otherwise the TSR will automatically be set to INVALID for not meeting timing requirements.

- BPAT will evaluate the coordinated request and update the status to CR_ACCEPTED if the request can be granted in full or to CR_COUNTEROFFER if a partial offer is available. The TSR can automatically be placed in a dead state if ATC is not available or the request fails initial validation checks.

The Response field will be populated for the TSR when the customer updates all the TSRs to a non-PENDING state in the (CR) Disposition field of the TSR.

TSRDetail - Windows Internet Explorer

STAGING

TSR Detail MW ATC Report

CPSE TSR Detail 69820555 CONFIRMED
Final Validation Result: Pass/NOCHANGE

Seller	Source Sink	Per Pod	Request Type	Start	Stop	MW Req	MW Grant	Bid Price	Offer Price	Ceiling Price	Price Unit
BPAT	BELL230 BIGBENDNDP	AVA BPAT BIGBEND	ORIGINAL	2015-08-01 00:00:00 PD	2016-08-01 00:00:00 PD	0	0	1741.0000	1741.0000	1741.0000	\$/MW-MONTH
Service	Increment	TS Class	TS Type	TS Period	TS Window	TS Subclass					
LTF-YEARLY NT	YEARLY	FIRM	NETWORK	FULL_PERIOD	SLIDING						
Path:	Preconfirmed: Yes	Competing: N	Negotiated:	Nerc Priority: 7	Other Priority:	Affiliate: NO	Submission Mask: 0	Impacted: 0			
	Comments	Times	References	Overrides							
Status		Queued	2015-05-07 16:57:50 PD	Deal	Queue Order						
Seller		Updated	2015-05-08 08:40:00 PD	Sale 76543	Lottery Order						
Provider		Response	2015-05-08 08:40:00 PD	Posting	Economic Flag						
Customer Impacted	OASIS AUTO ACTION: Enforcing Response Time Limit expiration. Setting status to CONFIRMED.	Re-Start		Request	Excluded	NO					
Reservation Type	0	Re-Stop		Reassigned	Competition State						
Provider Approval		Effective Queued		Seller	Nerc Priority						
C6 Status	ATTESTED	Loss Option		Related	Other Priority						
		Confirmation Time	2015-05-08 08:40:00 PD	Rollover Waived	CG Deadline	2015-05-08 17:57:50.000	Status Notification				
					Anc-Service-Link						

The TSR will automatically be CONFIRMED if the customer does not respond in time when the status is CR_ACCEPTED. The request will automatically be RETRACTED if the customer does not respond in time to a CR_COUNTEROFFER.