

Balancing Service Election for Dispatchable Energy Resource Balancing Service (DERBS) and Variable Energy Resource Balancing Service (VERBS)

Version 34

Effective: 10/01/15

The purpose of these proposed changes is to create a generic business process governing Balancing Service elections to avoid having to modify this business practice each rate period. The Balancing Service Election for Dispatchable Energy Resource Balancing Service (DERBS), and Variable Energy Resource Balancing Service (VERBS) Business Practice, Version 3, is modified to reflect changes to the rate schedule effective on 10/01/15 and to make clear that VERBS customers will have the opportunity to make a Balancing Service election before or during each rate period as outlined in the sections below.

The Balancing Service Election for Dispatchable Energy Resource Balancing Service (DERBS), and Variable Energy Resource Balancing Service (VERBS) Business Practice applies to the Dispatchable and Variable resources operating in the BPA Balancing Authority Area. This implements the requirements for Dispatchable and Variable Energy Resources to make their elections for receiving Balancing Services from BPA.

The Service Election form to identify a Balancing Service Election is located under [Forms](#).

BPA Policy Reference

- Transmission Rate Schedules/Provisions: [Ancillary and Control Area Service Rates, Variable Energy Resource Balancing Service](#)

Table of Contents

- A. Election Date
- B. Eligibility Criteria for Self-Supply of VERBS & DERBS
- C. Eligibility Criteria for Dynamic Transfer Out of the BPA Balancing Authority Area
- D. Submitting a Balancing Service Election
- E. Mid-Rate Period Elections
- F. Forms

A. Election Date

1. Each Dispatchable Energy Resource (DER) Customer in the BPA Balancing Authority Area must either purchase DERBS from BPA or make a Balancing Service Election to Self Supply comparable service for the upcoming rate period by Close of Business of the first Business day of April of each odd numbered year. This entails the Customer's election to:
 - a. Take DERBS, or
 - b. Self Supply balancing reserves, or

- c. Dynamically transfer a Generating Facility out of BPA's Balancing Authority
2. Each VER Customer must make a Balancing Service Election for the upcoming rate period by Close of Business of the first Business day of April of each odd numbered year. This entails the Customer's election to:
 - a. Take VERBS, and choose a scheduling paradigm that BPA has proposed to make available during the upcoming rate period, or
 - b. Self Supply balancing reserves, or
 - c. Self Supply generation imbalance reserve capacity or all components of VERBS, or
 - d. Participate in BPA's Customer Supplied Generation Imbalance program, or
 - e. Dynamically transfer a Generating Facility out of BPA's Balancing Authority.
3. Except as provided in the applicable Transmission, Ancillary, and Control Area Service rate schedule, a DER Customer that fails to make a Balancing Service Election pursuant to this Business Practice will be assumed to not be Self Supplying Balancing Resources and will be subject to the applicable Transmission, Ancillary, and Control Area Service rate schedule for DERBS during the upcoming rate period.
4. Except as provided in the applicable Transmission, Ancillary, and Control Area Service rate schedule, a VER Customer that fails to make a Balancing Service Election pursuant to this Business Practice will be subject to applicable Transmission, Ancillary, and Control Area Service rate schedule for VERBS uncommitted scheduling and will be subject to Intentional Deviation in accordance with BPA's Intentional Deviation policies in effect during the applicable rate period.
5. If a customer makes a service election based on BPA's proposed rate schedules, but the elected service is no longer available under the rate schedules included in the rate case Record of Decision, BPA will provide an opportunity for the customer to revise its election as soon as practicable.
6. If BPA adopts a timeline for its rates process - including timelines related to rate case settlement - that requires customers to make elections prior to the election deadlines specified in this business practice, the election deadlines set in the rates process will supersede the deadlines in this business practice.
7. Prior to the notification deadline, identified in this section, customers may change their election by submitting a new [Balancing Service Election Form](mailto:techforum@bpa.gov) to <mailto:techforum@bpa.gov>.

7-8. Applicable to customers electing to dynamically transfer out of Bonneville's BAA in BP-18: Bonneville will advise customers prior to April of 2017 on an achievable date when the resource(s) is forecast to be dynamically transferred out of Bonneville's BAA. To the extent that date is not possible due to technical issues and not customer choice, BPA will work with the customer to revise its customer election to match a new achievable date.

B. Eligibility Criteria for Self-Supply of VERBS and DERBS

1. A VER Customer that elects to Self-Supply balancing reserves or generation imbalance balancing reserves for the upcoming rate period must meet the eligibility criteria set forth in the Self Supply of Balancing Reserves Business Practice or the Customer Supplied Generation Imbalance Business Practice.

2. A DER Customer that elects to Self-Supply balancing reserves for the upcoming rate period must meet the eligibility criteria set forth in the Self Supply of Balancing Reserves Business Practice.

C. Eligibility Criteria for Dynamic Transfer Out of the BPA Balancing Authority Area

1. A DER or VER Customer that will be subject to the DERBS or VERBS rate on October 1 of a rate period, and that expects to dynamically transfer the output of its Generating Facility to another Balancing Authority Area any time during that rate period, must satisfy the eligibility requirements of the [Dynamic Transfer Operating & Scheduling Requirements Business Practice](#) prior to implementing the dynamic transfer.

D. Submitting a Balancing Service Election

1. DER Customers:
 - a. A DER Customer must submit Balancing Service Elections for each Generating Facility for which the Customer desires service via e-mail to techforum@bpa.gov. The following information must be included in the communication:
 - i. Name of the Generating Facility.
 - ii. Nameplate Generating Facility Capacity of installed generation.
 - iii. For a new dispatchable resource electing to Self-Supply, state the expected effective date Self-Supply will begin. Existing DERs must elect to Self Supply balancing reserves by the deadline in section A.1., above.
 - iv. If electing to move a Generating Facility out of the BPA Balancing Authority Area, provide the expected effective date of the move.
 - v. If not currently interconnected to BPA's Transmission system, provide the Generator Interconnection Request Queue Number of the Generating Facility and the expected date of commercial operation.
 - vi. The [Balancing Service Elections form](#).
2. VER Customers:
 - a. A VER Customer must submit Balancing Service Elections for each Generating Facility for which the Customer desires service via e-mail to techforum@bpa.gov. Please include the following information in the communication:
 - i. Name of the Generating Facility.
 - ii. Nameplate Generating Facility Capacity of installed generation.
 - iii. The scheduling election for each Generating Facility (from among the Scheduling options that BPA has proposed to make available during the upcoming rate period).
 - iv. For a new VER electing to Self-Supply generation imbalance reserve capacity or all components of VERBS, state the expected effective date Self-Supply will begin. Existing VERs must elect to Self-Supply balancing reserves by the deadline in section A.2., above.
 - v. If electing to move a Generating Facility out of the BPA Balancing Authority Area, provide the expected effective date of the move.
 - vi. If not currently interconnected to BPA's transmission system, provide the Generator Interconnection Request Queue Number of the Generating Facility and the expected date of commercial operation.

- vii. The [Balancing Service Elections form](#).

E. Mid-Rate Period Elections

1. If allowed in the rate schedules, VERBS customers may make a mid-Rate Period Balancing Service Election to change their scheduling and service elections. This requires the Customer's election of:
 - a. A superior scheduling commitment, or
 - b. Self Supply of balancing reserves, or
 - c. Dynamically transfer a Generating Facility out of BPA's Balancing Authority, or
 - d. Participation in Customer Supplied Generation Imbalance ("CSGI").
2. The total amount of generation nameplate movement will be described in the applicable rate schedule and will be offered on a first-come, first-served basis.
 - a. The expansion of self-supply, including the CSGI program and DTC will be limited to the amount specified in the applicable rate schedule.
3. The notification deadline to change scheduling and service elections will be Close of Business of the first Business day of April on even numbered years.
 - a. The [Balancing Service Elections form](#).
 - b. To make a mid-Rate Period election, a VER Customer must submit the [Balancing Service Elections form](#) via e-mail to techforum@bpa.gov, which will date and time-stamp the receipt of the request.
4. The effective date of the election change will be October 1 on even numbered years.
5. Prior to the notification deadline, identified in E.3, customers may elect to cancel a mid-Rate Period election in its entirety and return to their original Balancing Service Election for the rate period by notifying BPA in writing via e-mail to techforum@bpa.gov.

F. Forms

- [Mid-Rate Period Service Election](#)
- [Balancing Service Election](#)