

Long-Term Firm Queue: Evaluation of Requests and Offer of Service

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This Business Practice describes the evaluation and handling process of Long Term Firm (LTF) Transmission Service Requests.

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NOTE: In some instances, such as the System Impact Study (SIS), the policies and guidelines in this Business Practice do not apply to Transmission Service Requests (TSRs) received as part of BPA Transmission Services' 2008-2010 Network Open Season (NOS) processes. Refer to 2008, 2009, and 2010 Network Open Season Bulletins for information specific to how BPA Transmission Services will process 2008, 2009, or 2010 NOS requests.

OATT Policy Reference [Section II: Point-to-Point Transmission Service 2.2, 13.2, 15.2, 15.4, 17.7, 19, 27](#); [Section III: Network Integration Transmission Service: 32.3](#); [Attachment C](#)

A. Request for Pre-Evaluation of Transmission Service Requests (What-If)

1. BPA Transmission Services offers a pre-evaluation (What-If) to customers wanting to determine whether there is sufficient ATC across specific points on BPA's Transmission System before submitting a LTF TSR over webSmartOASIS.
 - a. All LTF TSRs with the exception of Renewals, Deferrals, and Transfers require additional Facility and System assessments such as Subgrid checks to determine if an offer of service may be granted.
 - b. What-Ifs are based only on Available Transfer Capability on the date the What-If is performed. No additional Facility or System assessment is included in the What-If.
 - c. What-Ifs are strictly a "Snapshot" in time on the date the What-If is performed.
2. To request a What-If, the Customer must complete the Transmission Reservation & Available Transfer Capability (ATC) Analysis Request (Analysis Request) form.

3. The Customer must provide the following information in the Analysis Request:
 - d. Requestor and Group/Customer (Name)
 - e. Contact Business Phone Number
 - f. Date Submitted
 - g. Service Type: NT or PTP
 - h. Generation Interconnection No./Generation Type
 - i. Source/POR
 - j. Sink/POD
 - k. MW
 - l. Approximate Start date
 - m. Duration
4. Email the completed Analysis Request to tblresdesk@bpa.gov. Include the Customer's Account Executive in the distribution list.

B. Evaluation of Long-Term Firm Transmission Service Requests

1. BPA Transmission Services evaluates each Point to Point (PTP) and Network (NT) LTF TSR based on the [Available Transfer Capability \(ATC\) Methodology](#), posted ATC values, and associated Power Transfer Distribution Factor (PTDF) calculated for each of the Network Flowgates, external interconnections, or interties identified at the time of the evaluation.
 - a. For requirements on the submission of supplemental information for NT TSRs see Requesting Transmission Service Business Practice.
2. Transmission service is offered to the Customer based on position in the LTF pending queue.
 - a. Priority order is established by the queue time of the LTF TSR. webSmartOASIS assigns the TSR an Assignment Reference (AREF) when the Customer submits a LTF TSR.
 - b. The status of the TSR will change from QUEUED to RECEIVED once BPA Transmission Services validates the information in the required webSmartOASIS TSR fields.
 - c. A PTDF calculation is performed for each LTF TSR to determine the impacts across affected Network Flowgates, external interconnections, or interties and the transmission capacity necessary to grant the Customer's request. Refer to the [ATC Methodology website, "Impacts of Long-Term Firm Requests"](#).
 - d. ATC is encumbered for LTF TSRs based on priority order. BPA Transmission Services continues to encumber ATC for a LTF TSR in the pending queue until an offer of service is either CONFIRMED by the Customer or released. See the ATC Methodology documentation at the website noted in section 1 above.

3. LTF TSRs over the Network, Southern Intertie, and the Montana Intertie must be submitted as separate requests for transmission service and are evaluated independently.
4. BPA Transmission Services evaluates each LTF TSR to determine whether it has sufficient ATC to fulfill the request. This evaluation includes consideration of the following factors:
 - a. Queue Time of the TSR
 - b. Capacity (megawatts (MW)) requested
 - c. Requested Service Commencement and Termination Dates, and resulting duration of requested transmission service
 - d. webSmartOASIS Source and webSmartOASIS Sink
 - e. Type of request submitted (i.e. an ORIGINAL, REDIRECT, RENEWAL, or DEFERRAL request)
 - f. Impact on constrained Network Flowgates, external interconnections, or interties calculated using the ATC Methodology, ATC Impacts of Long-Term Firm Requests and ATC Methodology, ATC Methodology Margin (AMM) and De Minimis Impact Dead-Band.
 - g. Post LTF ATC
 - h. Impacts on the sub-grid and/or local area system that could potentially cause constraints between the Point of Receipt (POR) and Point of Delivery (POD) as determined by BPA Transmission Services Planning.

B. Offering Transmission Service

1. BPA Transmission Services will offer a Customer an Exhibit once the determination has been made by BPA Transmission Services that there is:
 - a. Sufficient LTF ATC on impacted Network Flowgates, external interconnections, or interties
 - b. No sub-grid or local area issue(s).
2. If BPA Transmission Services is able to offer the Customer transmission service:
 - a. BPA Transmission Services will send the Customer two unsigned originals of the contract for transmission service (Exhibit A).
 - b. The Customer must sign and return both originals of Exhibit A to BPA Transmission Services offices so that they are received within 15 calendar days of the Date of Tender.
 - c. If the Customer fails to sign and return the two originals of Exhibit A within the specified timeframe, BPA Transmission Services will change the webSmartOASIS status of the TSR to DECLINED. The TSR will receive no further consideration.
 - d. The Customer may return the signed originals of Exhibit A either by one of the methods listed on the [Becoming A Transmission Customer website](#) or by email to txrequests@bpa.gov.
 - e. If the Customer returns the Exhibit A fax or email, BPA Transmission Services must receive the original signed hard-copies of Exhibit A within five Business Days after the date of the fax or email.
 - f. BPA Transmission Services will verify that the signed originals match the documents that were originally sent to the Customer.

3. BPA Transmission Services will make either of the following webSmartOASIS status modifications to offer service:
 - a. If BPA Transmission Services grants the entire MWs and duration the Customer requested (makes an offer of full service), BPA Transmission Services will change the webSmartOASIS status of the TSR to ACCEPTED.
 - b. If BPA Transmission Services makes an offer of Partial Service, it will change the webSmartOASIS status of the TSR to COUNTEROFFER.
4. The Customer must place the TSR in CONFIRMED status no later than Close of Business 15 Calendar Days after the date BPA Transmission Services changes the webSmartOASIS status of the TSR to ACCEPTED or COUNTEROFFER before the offer is RETRACTED. If the TSR is preconfirmed, the TSR status will automatically updated from ACCEPTED to CONFIRMED status. A TSR placed in RETRACTED status will receive no further consideration. When the Customer places the TSR in CONFIRMED status, the TSR is binding.
 - a. If the Customer places a COUNTEROFFER in CONFIRMED status and the Customer wants to be offered the remaining portion of the request if it becomes available, within 5 calendar days of the date the Customer places the counteroffer in CONFIRMED status the Customer must submit a new TSR for the remaining portion of the request and specify the AREF of the Original Request in the Deal Ref field of the remainder TSR. Citing the AREF of the Original Request will provide the request for the remaining portion with the queue time of the original request.
5. BPA Transmission Services will sign contract Exhibit A and send one of the executed documents to the Customer within five Business Days of the Customer placing the TSR in CONFIRMED status.
6. Upon receiving a Completed Application as defined in the tariff, BPA Transmission Services will change the status of the TSR to STUDY. This status may or may not involve a requirement for the Customer to execute further study agreements.
7. Within 30 days of receiving a Completed Application, BPA Transmission Services will respond to the Customer with either an offer or notice that an offer cannot be made at this time.
8. BPA Transmission Services will tender the Customer any and all agreement(s) identified in section 9 below if it is determined that they are required prior to offering the Service Agreement to the Customer.
9. The Customer must execute and submit a tendered agreement to BPA Transmission Services to retain its eligibility for an offer of LTF Transmission Service in accordance with the following timelines:
 - a. SIS Agreement - 15 calendar days from date of receipt by the Customer
 - b. System Facility Study (SFS) Agreement - 15 calendar days from date of receipt by the Customer
 - c. Environmental Compliance Agreement (ECA) and other environmental agreements - 30 calendar days from date of receipt by the Customer
 - d. Construction Agreement - 30 calendar days from date of receipt by the Customer
 - e. Financial Agreement - 30 calendar days from date of receipt by the Customer.

10. Failure to submit a signed agreement or other required documents to BPA Transmission Services within the timeframe specified above will result in the transmission request being designated DECLINED on webSmartOASIS.
11. BPA Transmission Services will postpone tendering a Service Agreement until all appropriate studies are completed or the need for the study is mitigated in some manner, if the Customer's request for LTF Transmission Service requires BPA Transmission Services to perform a study or studies or for the Customer to participate in one or more facility reinforcements and/or modifications. During this time, the Customer's request will retain its eligibility for an offer of Transmission Service.
 - a. Studies can be completed in two to 12 months if the requested service requires an operating nomogram limit within the rating of a WECC rated path.
 - b. Studies usually take 12 to 18 months to obtain a new WECC path rating if the requested service requires an increase in the rating of a WECC rated path.
12. Subject to ATC, for a LTF Transmission Request whose remaining duration is less than a year but 60 days or more from the requested service termination date, the offer of LTF Transmission Service will be for the remainder of the requested term.
13. If BPA Transmission Services cannot offer a Customer a Service Agreement, it may require the Customer to participate in more than one Transmission System upgrade and/or addition to alleviate system constraints on more than one affected Network Flowgate(s) or external interconnection(s).
14. BPA Transmission Services may provide each Customer a Financial Agreement that contains an initial estimate of its share of the cost of the project if multiple Customers have requested LTF Transmission Service across Network Flowgates, external interconnections, or interties that require Transmission System reinforcements and/or modifications to provide the necessary transmission capacity, and BPA Transmission Services decides to undertake the effort with financing from multiple parties. If no Financial Agreements are offered, BPA Transmission Services will provide each Customer an initial estimate of its share of the costs of the project in a Construction Agreement.
15. Subject to ATC and except for provisions implemented as part of OATT Sections 2.2 and 17.7 of the Tariff, and section 12 above, BPA Transmission Services will establish the Service Commencement Date as the later of:
 - a. The original Service Commencement Date requested by the Customer; or
 - b. The date on which construction of any required Direct Assignment Facilities and/or Network Upgrades is completed on the Transmission Network, external interconnections, or interties, whichever are applicable to the request.
16. An offer of transmission service may be made to a LTF TSR lower in the pending queue, while the higher positioned request is still pending pursuant to the following:
 - a. The lower positioned TSR will not utilize ATC over any Network Flowgates, external interconnections, or interties that has been encumbered for the higher positioned TSR; or
 - b. A TSR lower in the queue requires capacity on one or more constrained Network Flowgates, external interconnections, or interties during a time

period when transmission service can be offered without affecting the capacity encumbered for a TSR at a higher position in the queue

C. Provisions for a LTF TSR Approaching the Requested Stop Date

1. When a pending LTF TSR has a remaining duration of less than 60 days (that is, there are less than 60 days until the requested service termination date), BPA Transmission Services will give the TSR an webSmartOASIS status of REFUSED. The TSR will receive no further consideration.
2. For a LTF TSR that is awaiting the completion of required transmission upgrades (Initial TSR), as demonstrated by having met the requirements listed in C.3 below, BPA Transmission Services will allow the Customer to submit a Follow-on TSR to retain queue priority and pending status upon the expiration of the Initial TSR or subsequent Follow-on TSRs.
3. The Initial TSR or subsequent Follow-on TSRs must meet all of the following requirements to be considered as awaiting the completion of required transmission upgrades:
 - a. The Initial TSR is not associated with an effective PTSA;
 - b. The Initial TSR is or previously was included in an individual system impact study or cluster study;
 - c. The Customer of an Initial TSR is actively meeting or has met BPA TS' requirements for supporting the identified transmission expansion project(s) associated with that TSR, as those requirements may change; and
 - d. The Initial TSR qualifies for Reservation Priority under section 2.2 of BPA's Open Access Transmission Tariff and any applicable Business Practices.
4. The following requirements apply to the submittal of a Follow-on TSR:
 - a. The Customer must submit a Follow-on TSR at least one year prior to the requested stop date of the Initial TSR in order to retain the queue time of the Initial TSR.
 - i. If applicable, the Customer must submit a subsequent Follow-on TSR at least one year prior to the requested stop date of a preceding Follow-on TSR in order to retain the queue time of the Initial TSR.
 - ii. BPA will permit the submittal of a Follow-on TSR after the one-year deadline if the Follow-on TSR is submitted within 10 business days of the date that the Customer's TSR first meets the requirements listed in section C.3 above.
 - iii. BPA Transmission Services will not accept the submission of Follow-on TSRs after these deadlines.
 - b. The start date of the Follow-on TSR must match the stop date of the Initial TSR;
 - i. If applicable, the start date of any subsequent Follow-on TSR must match the stop date of the preceding Follow-on TSR.
 - c. The Follow-on TSR must reference the AREF of the Initial TSR in the Deal Ref section;
 - i. If applicable, any subsequent Follow-on TSR must reference the AREF of the preceding Follow-on TSR in the Deal Ref section.
 - d. The service type, POR, POD, Source, Sink and Path of the Follow-on TSR must match that of the Initial TSR; and
 - e. The Service Duration of the Follow-on TSR must match the Initial TSR or preceding Follow-on TSR.

5. For an Initial TSR that is type REDIRECT, the Follow-on redirect TSR must meet the following requirements:
 - a. The Transmission Customer must have renewed the Parent reservation in order to be able to submit a Follow-on redirect TSR.
 - b. The Follow-on redirect TSR must be a redirect of the RENEWAL Parent reservation.
 - c. For a Follow-on redirect TSR, the Service Duration must match that of the RENEWAL Parent reservation.
 - d. The start date of the Follow-on redirect TSR must match the stop date of the Initial redirect TSR.
 - i. If applicable, the start date of any subsequent Follow-on redirect TSR must match the stop date of the preceding Follow-on redirect TSR.
 - e. The Follow-on redirect TSR must reference the AREF of the Initial redirect TSR in the Deal Ref section;
 - i. If applicable, any subsequent Follow-on redirect TSR must reference the AREF of the preceding Follow-on redirect TSR in the Deal Ref section
 - f. The service type, POR, POD, Source, Sink and Path of the Follow-on redirect TSR must match that of the Initial redirect TSR.
 - i. If applicable, the service type, POR, POD, Source, Sink and Path of a subsequent Follow-on redirect TSR must match that of the preceding Follow-on redirect TSR.
6. The Transmission Customer will not be charged a TSR processing fee or be required to provide a TSR deposit for the submission of Follow-on TSRs.

The example figures below display the relationship between Follow-on redirect TSRs and the CONFIRMED Parent reservation. Figure A shows CONFIRMED Parent reservation X with Initial redirect TSR Y. Figure B shows the RENEWED Parent reservation X_1 , and the associated Follow-on redirect TSR Y_1

Figure A: Initial redirect TSR Y of Confirmed Parent reservation X

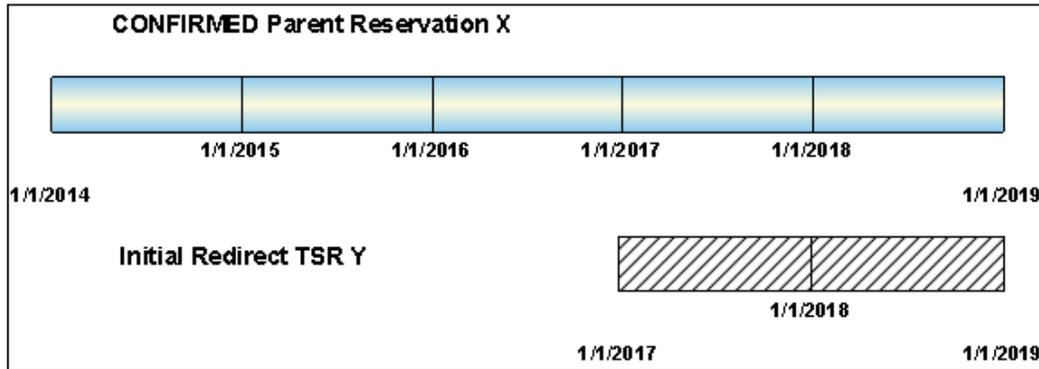
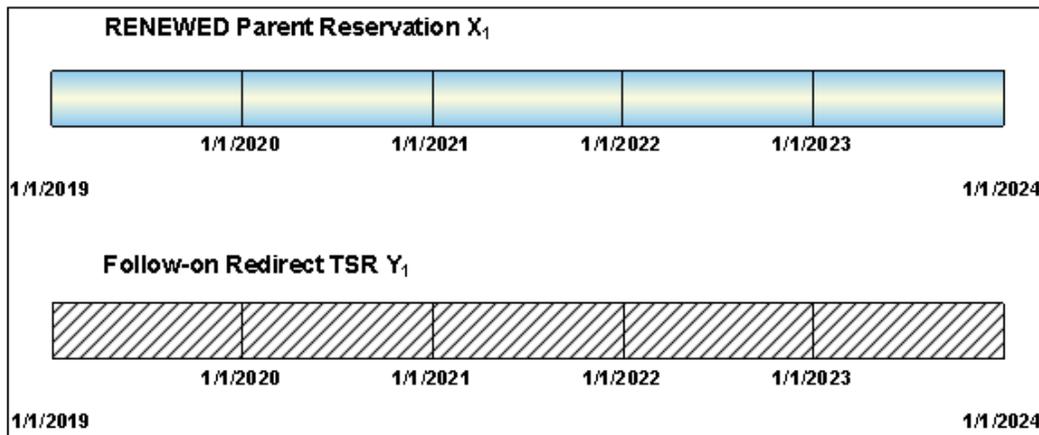


Figure B: Follow-on redirect TSR Y₁ of Renewed Parent reservation X₁



D. Specific Provisions

1. If a LTF TSR requires a WECC path rating increase, BPA Transmission Services cannot obtain Western Electricity Coordinating Council (WECC) approval for an increase in the WECC rating of paths identified in the WECC path rating catalog without participation by the Transmission Provider(s) at both ends of the intertie/external interconnection.
 - a. The Customer will be required to advance fund the WECC study process as well as any other required agreements to maintain a valid completed application. These additional studies may be able to be performed at the same time as the System Facility Study (SFS).
 - b. Studies usually take 12 to 18 months to obtain a new WECC path rating if the requested service requires an increase in the rating of a WECC rated path.
2. Montana Intertie Transmission Requests
 - a. The portion of the Montana Intertie between Broadview and Townsend is outside of the service area in which BPA Transmission Services has authority to construct additional facilities to provide more capacity.

- b. If there is a future upgrade of the Montana Intertie, BPA Transmission Services could acquire additional rights from Broadview to Townsend only by agreement with the owners of the Broadview to Townsend line segment.
- c. BPA Transmission Services will require the Customer to arrange any upgrades on other systems (including the Montana Intertie from Broadview to Townsend) that may be required to provide additional capacity on the Townsend to Garrison segment pursuant to Section 21.1, Responsibility for Third-Party System Additions, of the [OATT](#).

E. Environmental Review

1. If an environmental review is required, BPA Transmission Services will offer the Customer an initial Environmental Compliance Agreement (ECA) as soon as practicable, but no later than the completion date of the first required OATT study, which is typically a System Impact Study (SIS).
2. The ECA may be modified as the Customer's request is refined and additional environmental review tasks are identified.
3. If all other requirements have been met, upon completion and approval to proceed pursuant to the decision reached under the ECA, BPA Transmission Services will offer the Customer a Financial Agreement and/or a Construction Agreement, if needed.

F. Generation Interconnection Process

1. Assuming sufficient ATC, BPA Transmission Services will proceed with offering an Exhibit for a TSR considered linked to a Generation Interconnection Request when all usual criteria (i.e., those that apply to non-linked requests) for offering transmission service are met and the earliest of:
 - a. The Generation Interconnection Request is WITHDRAWN by the Interconnection Customer; or
 - b. The Interconnection Customer fails to conform to the required Large Generation Interconnection Procedure [LGIP] timelines and requirements; or
 - c. The Customer requests in writing that an Exhibit be offered; or
 - d. Fifteen calendar days after BPA Transmission Services delivers to the Customer a completed Interconnection Feasibility Study report; or
 - e. If the Interconnection Customer waives the Interconnection Feasibility Study, fifteen days after BPA Transmission Services tenders to the Interconnection Customer an Interconnection System Impact Study (ISIS) Agreement.