



Submitting and Processing Short-Term Firm Requests, Version 3 - Bulletin

Effective: 06/12/07

Associated business practice: Scheduling Transmission Service

Impacted Market: Short-Term Firm (Daily Firm, Weekly Firm, and Monthly Firm)

This bulletin describes the process for submitting and processing Short-Term Firm (STF) TSRs in the Open Access Scheduling Information System ([OASIS¹](#)) including revisions to the Short-Term Firm market competition rules.

¹Open Access Same-Time Information System

Current Process to be Modified

1. STF TSRs are currently submitted via the NWOASIS.
 - a. Customers are limited to submitting a maximum of eight STF TSRs to BPA Transmission Services per day for the same Transmission Contract Holder (TCH), POR¹/POD² combinations and transmission product type.
 - b. If BPA Transmission Services does not have sufficient Available Transfer Capability (ATC³) to grant a TSR⁴ in full, a Customer⁵ must have submitted partial parameters on its TSR in order to be offered partial service. If no partial parameters are submitted, no partial will be offered and the request will be REFUSED.
2. STF TSRs are currently processed via BPA Transmission Services' Bumping Market.
 - a. Shaped capacity will not be offered for partial service.
 - b. See BPA Transmission Services' Requesting Transmission Service Business Practice for further details and requirements.

New Process

1. Submitting a STF TSR
 - a. A Customer must hold an executed Point-to-Point (PTP) umbrella agreement, prior to submitting a STF TSR.
 - b. All STF TSRs must be submitted to BPA Transmissions Services' westTrans OASIS ("OASIS").
 - c. Queue time will be the time the OASIS system places the TSR in QUEUED status. The OASIS will assign the TSR an AREF⁶ at that time.
 - d. There is no limit to the number of TSRs a Customer may submit each day.
2. Processing a STF TSR

¹Point of Receipt is an interconnection on the Transmission Provider's Transmission System where capacity and energy will be made available by the Delivering Party; An OASIS field on a TSR that is the scheduling POR.

²Point of Delivery is a point on the The Transmission Provider's Transmission System where capacity and energy transmitted by the Provider will be made available to the Receiving Part; An OASIS field on a TSR that is the scheduling POD.

³Available Transfer Capability

⁴Transmission Service Request

⁵Any customer taking service under Use of Facilities (UFT), Formula Power Transmission (FPT), Integration of Resources (IR), Part II or Part III of the OATT.

⁶A unique reference number automatically assigned by OASIS to provide a unique record for each transmission or ancillary service request.

Reservation Timing Requirements Table A:				
Class	Service Type	Time Queued Prior to Start	BPA Transmission Services Evaluation Time Limit ¹	Customer Confirmation Time Limit ² after Accepted or Counteroffer ³
Firm	Daily	<24 hours	Best effort	2 hours ⁴
Firm	Daily	N/A	Best effort, but less than 30 days ⁵	24 hours ⁴
Firm	Weekly	N/A	Best effort, but less than 30 days ⁵	48 hours ⁴
Firm	Monthly	N/A	Best effort, but less than 30 days ⁵	4 days ⁴

¹ Consistent with BPA Transmission Services OATT, measurement starts at the time the request is queued.

² Confirmation time limits are not to be interpreted to extent reservation-scheduling deadlines or to override preemption deadlines.

³ Measurement starts at the time the request is first moved to either ACCEPTED or COUNTEROFFER. The time limits does not reset on subsequent changes of state.

⁴ The Confirmation Time Limit or 10:00:00 PPT¹ of the Preschedule day (whichever is earlier).

⁵ Subject to expedited time requirements, BPA Transmission Services will make best efforts to respond within 72 hours, or prior to the reservation-scheduling deadline, whichever is earlier, to a request for Monthly/Weekly/Daily Firm Service received during period 2-30 days ahead of the service start time.

3. If BPA Transmission Services has sufficient STF ATC to make a full offer in response to a STF TSR, it will give the TSR an OASIS status of ACCEPTED, within the timelines specified in the Reservation Timing Requirements Table A.
 - a. If the TSR was submitted preconfirmed, the OASIS status will automatically change to CONFIRMED.
 - b. If the TSR was not submitted preconfirmed, the Customer may give the TSR an OASIS status of WITHDRAWN or CONFIRMED, within the timelines specified in the Reservation Timing Requirements Table A.
 - i. If the Customer does not respond within the specified time limit, BPA Transmission Services will give the TSR an OASIS status of RETRACTED. This is a final state, and the request will receive no further consideration.

¹Pacific Prevailing Time

4. If BPA Transmission Services does not have sufficient STF ATC to make a full offer in response to a STF TSR, that request becomes the "Challenger¹" and all earlier-queued STF TSRs that meet all the following criteria will be SUPERSEDED:
 - a. Is of shorter duration than the Challenger;
 - b. If SUPERSEDED, would make a larger offer to the Challenger possible; and
 - c. Is in any one of the following OASIS statuses:
 - i. QUEUED
 - ii. RECEIVED
 - iii. STUDY
 - iv. COUNTEROFFER
 - v. ACCEPTED

5. If BPA Transmission Services does not have sufficient STF ATC to make a full offer in response to a Challenger after all pending TSRs that meet the criteria in section 4 above have been SUPERSEDED, a competition is initiated when there is a CONFIRMED TSR ("Defender²") in the conditional window that meets all the following criteria:
 - a. Is of shorter duration than the Challenger;
 - b. If DISPLACED, would make a larger offer to the Challenger possible;
 - c. If the Defender chooses to exercise its right of first refusal and match the duration of the Challenger, there is sufficient ATC for a valid Matching TSR; and
 - d. The time remaining before the Defender's TSR crosses the unconditional window threshold is greater than the Defender's competition confirmation time limit, per the Reservation Timing Requirements Table B (see 6 below).

6. If BPA Transmission Services does not have sufficient STF ATC to make a full offer in response to a Challenger after all pending TSRs that meet the criteria in section 4 above have been SUPERSEDED, and the conditions in section 5 above are not met, no competition is held.
 - a. The Defender remains in an OASIS status of CONFIRMED.
 - b. The Challenger's TSR is given an OASIS status of either COUNTEROFFER, if there is sufficient ATC for a partial offer, or REFUSED, if there is no ATC for a partial offer regardless of the first day of ATC availability.

¹A Transmission Customer with a Competing Request in OASIS.

²A customer who has submitted a Deferral Request to delay its Service Commencement Date for transmission services or a customer who has submitted a Renewal Request to exercise its OATT Section 2.2 Reservation Priority Rights for transmission service.

- c. If the status is set to COUNTEROFFER:
 - i. The granted capacity may be a shaped profile, to offer the maximum STF ATC possible;
 - ii. Zero can be a valid MW value for any increment of the requested service; and
 - iii. The Customer may give the TSR an OASIS status of WITHDRAWN or CONFIRMED, within the time limit specified in the Reservation Timing Requirements Table B below.
 - iv. If the Customer does not respond within the specified time limit, BPA Transmission Services will give the TSR an OASIS status of RETRACTED. This is a final state and the request will receive no further consideration.
- d. If the status is set to REFUSED, the TSR receives no further consideration.

7. Competition in the STF Market

a. Reservation Timing Requirements Table B:

Class ²	Service Type ²	Time QUEUED Prior To Start ²	Customer Competition Confirmation Time Limit ¹	Unconditional Threshold
Non-Firm	Hourly	< 24 Hours	5 minutes	1 hour Prior to Start
Non-Firm	Hourly	> 24 Hours	30 minutes	1 hour Prior to Start
Firm	Hourly	N/A	30 minutes	1400 hours of pre-schedule day
Firm	Daily	< 24 hours	2 hours	The earlier of 1400 hours of pre-schedule day or 1 day Prior to Start
Firm	Daily	> 24 hours	24 hours	The earlier of 1400 hours of pre-schedule day or 1 day Prior to Start
Firm	Weekly	N/A	24 hours	1 week Prior to Start
Firm	Monthly	N/A	24 hours	1 month Prior to Start

¹ Timing starts upon Defender's notification of the competition.

² Based on the challenger's request.

8. If BPA Transmission Services initiates a competition:
 - a. The Defending TSR will have the **Competing Request**¹ Flag set to “Yes” and the AREF of the Challenging TSR will be entered in the Seller Comments field;
 - b. Dynamic notification of this change to the Defending TSR will be sent to the Defender, if the Customer has arranged to receive such notices; and
 - c. The Challenger receives no notification.

9. To keep all of its conditionally CONFIRMED granted capacity, the Defender must submit a preconfirmed Matching TSR, within the time limit specified in the Reservation Timing Requirements Table B above, that is identical to the Defending TSR, except:
 - a. The Stop time has been extended out to make the duration of the Matching TSR equal to the Challenging TSR (the period between the Defending TSR Stop time and the Matching TSR Stop time will be referred to as the “Extended Period”);
 - b. The capacity requested in the Extended Period is equal to the peak capacity granted in the Defending TSR; and
 - c. The Related Ref field is filled with the AREF of the Defending TSR.

10. If a valid Matching TSR is submitted within the specified timelines, BPA Transmission Services will:
 - a. Give the Defending TSR an OASIS status of DISPLACED;
 - b. Give the Matching TSR an OASIS status of ACCEPTED/CONFIRMED; and
 - c. Search for the next-in-queue conditionally CONFIRMED TSR that meets the conditions in 4 - 4.d above.
 - d. If a new Defender is found, initiate a new competition.

11. If no new Defender is found, the Challenger’s TSR is given an OASIS status of either COUNTEROFFER, if there is sufficient ATC for a partial offer, or REFUSED, if there is no ATC for a partial offer.
 - a. If the status is set to COUNTEROFFER, the Customer may give the TSR an OASIS status of WITHDRAWN or CONFIRMED, within the timelines specified in the Reservation Timing Requirements Table A.
 - b. If the Customer does not respond within the specified time limit, the TSR will get an OASIS status of RETRACTED. This is a final state and the request will receive no further consideration.

¹A TSR in OASIS with the earliest queue-time that meets the Deferral or Renewal Competition criteria.

12. If no valid Matching TSR is submitted within the specified timelines, BPA Transmission Services will determine whether the offer now possible for the Challenging TSR is a full or partial offer.
 - a. If a full offer is possible, see 2 - 2.b.i above.
 - b. If a partial offer is possible, see 5.c - 5.c.iv above.
 - c. If the Challenging TSR is given an OASIS status of CONFIRMED, the Defending TSR will:
 - i. Get an OASIS status of DISPLACED, if all its capacity is needed to enable an offer to the Challenger; or
 - ii. Have the portion of its capacity needed to fill Challenger’s request Recalled.
 - d. If the Challenging TSR is given an OASIS status of WITHDRAWN or RETRACTED, the Defending TSR:
 - i. Remains in an OASIS status of CONFIRMED; and
 - ii. Competing Request Flag is set to “No”.

Impacted Business Practices

- New Customer Application Process for Transmission Service
- Requesting Transmission Service
- Scheduling Transmission Service

Version History

Version 2	06/12/07 Added the language “regardless of the first day of ATC availability” to step 2.2.4.2. Added step 2.2.4.2.1.2 “Zero can be a valid MW value for any increment of the requested service.”
Version 1	02/28/07 Changed the Customer Competition Confirmation Time Limit for Hourly Firm in the Reservation Timing Requirements Table B from 5 minutes to 30 minutes. Added Non-Firm Hourly > 24 Hours to the Reservation Timing Requirements Table B.