



Submitting and Processing Hourly Requests, Version 2 - Bulletin

Effective: 01/04/08

Associated business practice: Scheduling Transmission Service

This bulletin describes changes to the process for submitting and processing Hourly Firm and Non-Firm Transmission Service Requests (TSRs) in the westTTrans Open Access Scheduling Information System (OASIS¹). The current process to modified involves hourly reservations made to BPA Transmission Services' Preschedule and Real-Time staff, via phone.

Current Process to be Modified

Hourly reservations are made to BPA Transmission Services' Preschedule and Real-Time staff, via phone.

New Process

1. Submitting an Hourly TSR²
 - a. A Customer³ must hold an executed Service Agreement, prior to submitting an Hourly TSR.
 - b. A Point-to-Point (PTP) Service Agreement is required for submittal of an Hourly Firm TSR.
 - c. A Network Integration (NT) Transmission Service Agreement is required for submittal of an Hourly Non-Firm NT TSR.
 - d. A PTP or an Integration of Resources (IR) agreement is required for submittal of an:
 - i. Hourly Non-Firm TSR; or
 - ii. Hourly Non-Firm Secondary⁴ TSR (a Redirect on a Non-Firm basis).
 - e. All Hourly TSRs must be submitted to BPA Transmission Services' westTTrans OASIS ("OASIS").

¹Open Access Same-Time Information System

²Transmission Service Request

³Any customer taking service under Use of Facilities (UFT), Formula Power Transmission (FPT), Integration of Resources (IR), Part II or Part III of the OATT.

⁴NERC Priority 1 Hourly Non-Firm Point-to-Point (PTP) Transmission Service.

- f. BPA Transmission Services will allow Customers to submit shaped Hourly TSRs.
 - i. 0 MW increments are permitted in shaped Hourly TSRs.
 - ii. The duration of the TSR will be the period of time between the requested Start and Stop times.
- 2. Queue time will be the time the OASIS system places the TSR in QUEUED status. The OASIS will assign the TSR an AREF¹ at that time.
- 3. There is no limit to the number of TSRs a Customer may submit each day.

Processing an Hourly Firm TSR

- 1. If BPA Transmission Services has sufficient ATC² to make a full offer in response to an Hourly Firm TSR, it will give the TSR an OASIS status of ACCEPTED, within the timelines specified in the Reservation Timing Requirements Table 1A.
 - 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 1A.
 - 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.

Reservation Timing Requirements Table 1A				
Class	Service Increment	Time Queued Prior to Start	BPA Transmission Services Evaluation Time Limit ¹	Customer Confirmation Time Limit ² after Accepted or Counteroffer ³
Firm	Hourly	<1 hour	Best Effort	5 minutes
Firm	Hourly	>1 hour and <24 hours	30 minutes	5 minutes

¹A unique reference number automatically assigned by OASIS to provide a unique record for each transmission or ancillary service request.

²Available Transfer Capability

Firm	Hourly	> 24 hours	Best Effort	30 minutes
<p>¹Consistent with BPA Transmission Services OATT, measurement starts at the time the request is queued.</p> <p>Confirmation time limits are not to be interpreted to extent reservation-scheduling deadlines or to override preemption deadlines.</p> <p>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.</p>				

2. If BPA Transmission Services does not have sufficient ATC to make a full offer in response to an Hourly Firm TSR, that request becomes the “Challenger¹” and all earlier-queued 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.

3. If BPA Transmission Services does not have sufficient ATC to make a full offer in response to a Challenger after all pending TSRs that meet the criteria in steps 2.b and 2.c 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

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.

- 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.
4. If BPA Transmission Services does not have sufficient ATC to make a full offer in response to a Challenger after all pending TSRs that meet the criteria in 2 - 2.c above have been SUPERSEDED, and the conditions in 3 - 3.d 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.
 - c. If the status is set to COUNTEROFFER:
 - i. The granted capacity may be a shaped profile, to offer the maximum ATC possible; and
 - ii. The Customer may give the TSR an OASIS status of WITHDRAWN or CONFIRMED, within the timelines specified in the Reservation Timing Requirements Table 1A above.
 - iii. 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.

Processing an Hourly Non-Firm TSR

1. If BPA Transmission Services has sufficient ATC to make a full offer in response to an Hourly Non-Firm TSR, it will give the TSR an OASIS status of ACCEPTED, within the timelines specified in the Reservation Timing Requirements Table 2A.
 - 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 2A.
 - 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.

Reservation Timing Requirements Table 2A				
Class	Service Increment	Time Queued Prior to Start	BPA Transmission Services Evaluation Time Limit ¹	Customer Confirmation Time Limit ² after Accepted or Counteroffer ³
Non-Firm	Hourly	<1 hour	Best Effort	5 minutes
Non-Firm	Hourly	>1 hour and <24 hours	30 minutes	5 minutes
Non-Firm	Hourly	> 24 hours	Best Effort	30 minutes

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 COUNTER-OFFER. The time limits does not reset on subsequent changes of state.

2. If BPA Transmission Services does not have sufficient ATC to make a full offer in response to an Hourly Non-Firm TSR, no competition is held. The 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 a partial offer is possible and the status is set to COUNTEROFFER.
 - i. The granted capacity may be a shaped profile, to offer the maximum ATC possible; and
 - ii. The Customer may give the TSR an OASIS status of WITHDRAWN or CONFIRMED, within the timelines specified in the Reservation Timing Requirements Table 2A above.
 - iii. 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.
3. If the status is set to REFUSED, the TSR receives no further consideration.

Competition in the Hourly Firm Market

1. 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 Defender has arranged to receive such notices; and
 - c. The Challenger receives no notification.
2. 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 below 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.

Reservation Timing Requirements Table B				
Class ²	Service Increment ²	Time Queued Prior to Start ²	Customer Competition Confirmation Time Limit ¹	Unconditional Threshold
Non-Firm	Hourly	N/A	5 minutes	1 hour prior to Start
Firm	Hourly	N/A	5 minutes	1400 hours (PPT ²) of preschedule day
¹ Timing starts upon Defender's notification of the competition. ² Based on the challenger's request.				

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

²Pacific Prevailing Time

3. 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 the Processing an Hourly Firm TSR section above.
 - i. If a new Defender is found, initiate a new competition.
 - ii. 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.
 - iii. 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 1A above.
 - iv. 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.
 - v. If the status is set to REFUSED, the TSR receives no further consideration.
4. 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 the Processing an Hourly Firm TSR section above.
 - b. If a partial offer is possible, see the Processing an Hourly Firm TSR section above, steps 3.a-c.
 - 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".