

### FERC 676 Updates BP Updates

CBPI March 16, 2023

Mike Steigerwald



#### Agenda

- FERC 676-I Update:
  - Preemption and ROFR for Hourly Service
- FERC 676-J Update:
  - Dynamic Notification, including Renewal Date Notification
  - Curtailment Posting on OASIS
  - OASIS List Templates
- Recent Business Practice Updates
  - Redirect of Transmission Service
  - TSR Evaluation
- Miscellaneous
  - Pending Redirects
  - OASIS Security

# FERC 676-I: Preemption and ROFR (PCM)

Mike Steigerwald

#### Preemption and ROFR for Hourly service

- The TC-24 Tariff adopts a new conditional reservation deadline for Hourly Firm service.
- This Tariff takes effect on October 1, 2023.
- BPA was permitted to consider implementing PCM for Hourly service sooner than Oct 1 as long as there were no stakeholder objections. BPA proposed an April schedule.
- BPA has received multiple objections to the April schedule.
- Therefore, BPA will implement PCM for Hourly service starting Oct 4 to coincide with the new Tariff date.

Version 5 of the Preemption of Short-term Transmission Service business practice has already been posted.

#### Fall Implementation Schedule for Hourly PCM

- March 7: Decision announced for a Fall schedule.
- March 10: Preemption BP v5 posted with comments.
- March 16: Answer any questions in the CBPI call.
- Sept: Additional training session (if needed)
- Oct 1: TC-24 tariff effective
- Oct 4: BP v5 effective date.
- Oct 4: Start a phased implementation.
  - Oct 4: Hourly Firm NT vs Hourly Firm PTP lowest volume and risk.
  - Oct 18: Hourly Firm PTP vs Hourly Firm PTP first ROFR activity in the Hourly market. Customer timing and scheduling concerns.
  - Nov 8: Hourly Non-firm PTP vs Hourly Non-firm PTP Highest volume and tightest timeframes. Only applies to 1:1 paths since ATC is still unlimited on flow-based paths.

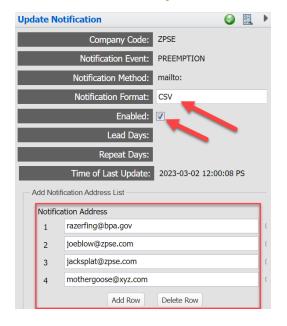
# FERC 676-J: OASIS Dynamic Notification

**Bob Zerfing** 

#### **Dynamic Notification Overview**

In Fall 2022, webSmartOASIS Release 3.13 introduced a new Customer notification functionality called Dynamic Notification.

- It provides a common way to subscribe to multiple "event" notifications.
- Events are subscribed at the Customer level (not an individual user).
- A Customer will have different records defined for each Event. Each record may contain one or more individual emails for that Event.



Notification	<b>△</b> ▼	□ / 3	· P C					
Expand/Collapse	<b>Company Code</b>	Notification Event	<b>Notification Method</b>	Notification Address	Notification Format	Enabled	Lead Days	Repeat Days
						~		
+	ZPSE	PTP_SELLER	mailto:	razerfing@bpa.gov	OTHER	Yes		
-	ZPSE	PREEMPTION	mailto:	razerfing@bpa.gov	CSV	Yes		
	ZPSE	PREEMPTION	mailto:	joeblow@zpse.com	CSV	Yes		
	ZPSE	PREEMPTION	mailto:	jacksplat@zpse.com	CSV	Yes		
	ZPSE	PREEMPTION	mailto:	mothergoose@xyz.com	CSV	Yes		
+	ZPSE	PTP_RENEWAL	mailto:	razerfing@bpa.gov	OTHER	Yes	765	0
+	ZPSE	PTP_CUSTOMER	mailto:	abc@def.gov	OTHER	Yes		
+	ZPSE	AS_SELLER	mailto:	razerfing@bpa.gov	CSV	No		
+	ZPSE	NITS	mailto:	abc@def.gov	OTHER	Yes		
+	ZPSE	SECURITY_LIMITS	mailto:	razerfing@bpa.gov	OTHER	Yes		

#### **Notification Events**

Event	Description	Old / New
PTP_CUSTOMER	Status updates on TSRs as a Customer.	Replaces prior functionality.
PTP_SELLER	Status updates on TSRs as a Seller.	Replaces prior functionality.
SECURITY_LIMITS	Limit is placed on a TSR.	Replaces prior functionality.
PREEMPTION	Notifies of PCM activity.	Replaces prior functionality.
PTP_RENEWAL	Renewal Date is approaching.	New
NITS	Status updates on NITS.	New
AS_SELLER	Not used by BPA.	Ancillary Services not on OASIS.

#### **New Notification Event for Prior Functionality**

- PTP\_CUSTOMER: Email notification on any new or updated PTP or NT request/reservation where the registered company is identified as the CUSTOMER\_CODE.
  - This is in addition to any notification issued based on the Mailto: URL supplied in the STATUS\_NOTIFICATION field on the TSR.
  - This is used for NT TSRs as well until NITS Scheduling Rights are implemented.
- PTP\_SELLER: Email notification on any new or updated PTP request/reservation where the registered company is identified as the SELLER\_CODE.
- SECURITY\_LIMITS: Email notification when a Reliability Limit has been placed on a reservation to signal an Outage that reduces TTC. This is an OATI specific implementation feature and not found in the NAESB standard.

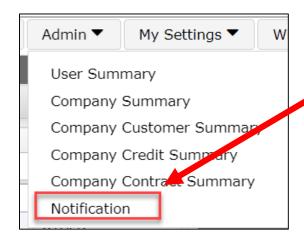
#### Prior Functionality that has been Replaced

As discussed in the November CBPI call, this was the prior functionality that has now been migrated to the Dynamic Notification subscription process.

- TSR Updates: Status changes on PTP and NT TSRs for both Customers and Sellers.
- Security Limits: TSR Reliability Limits (*i.e.*, soft limits)

Require Comments:	
Allow Fractional MW:	
Allow TSR with Null Path:	
Recall Customer List:	ALL
Notification Method:	○ E-MAIL S&CP ○ E-MAIL Revised ○ E-MAIL Tabular ○ HTTP ○ HTTPS
Notification URL:	
Notification Method:	○ E-MAIL S&CP ○ E-MAIL → ○ E-MAIL Tabular ○ HTTP ○ HTTPS
Seller Notification URL:	
Notification Types:	TSR Updates
\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	Security Limits

#### Notification Display: Company Code and Event

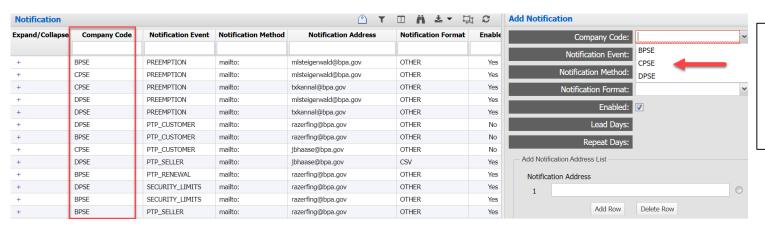


- The new Dynamic Notifications are found in
   OASIS under menu: Admin → Notification
- Company Code: Permission to add and modify Notifications is tied to a user's Company Code.
- There are six Events used by BPA.



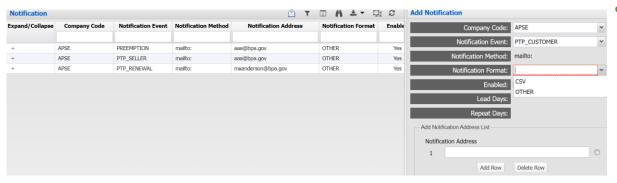
#### **Notification Display: Agents**

- Agents can enter notifications for their own Company Code as well as for the Company Code of their clients.
  - However they can only enter one Company Code and one Notification Event at a time.
- Agents can have their client's notifications go only to their client, only to the agent, or a combination of both.
- An agent's clients can only enter or modify notifications assigned to their Company Code.



DPSE is an agent for BPSE and CPSE

#### Notification Display: Format and Enabled box



There are two
Notification Formats
(CSV and OTHER).
See next slide.



- Check to send notifications.
- Uncheck to disable notifications



 Notification Format and Enabled are blanket settings that apply to all email addresses entered for that Company Code and Notification Event. They cannot be set differently for individual addresses.

#### **Notification Format Examples**

CSV



REQUEST\_STATUS=200 TIME\_STAMP=20221117093900CS VERSION=3.3 TEMPLATE=reliability
OUTPUT\_FORMAT=DATA PRIMARY\_PROVIDER\_CODE=BPAT PRIMARY\_PROVIDER\_DUNS=959010968
RETURN\_TZ=CS DATA\_ROWS=1

COLUMN\_HEADERS=POSTING\_REF,LIMIT\_PROVIDER,SELLER\_CODE,CUSTOMER\_CODE,ASSIGNMENT\_REF,REDU-762027761,BPAT,APSE,71121585,RELOAD,20221117160000PS,20221117170000PS,1,BPAT44100,"",20221117073802PS

OTHER

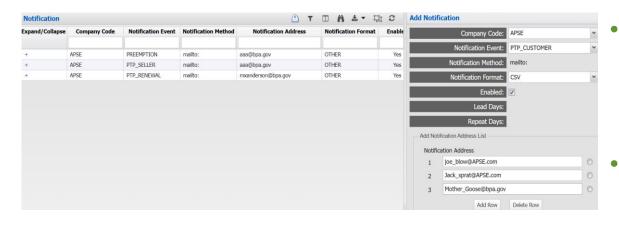


Retention Policy BPA Capstone - 7 Year Policy (7 years) Expires 11/17/2029

REQUEST\_STATUS=200 TIME\_STAMP=20221117115200CS VERSION=3.3 TEMPLATE=reliability OUTPUT\_FORMAT=DATA PRIMARY\_PROVIDER\_CODE=BPAT PRIMARY\_PROVIDER\_I RETURN TZ=CS DATA ROWS=3

POSTING_REF	LIMIT_PROVIDER	SELLER_CODE	CUSTOMER_CODE	ASSIGNMENT_REF	REDUCTION_TYPE	START_TIME	STOP_TIME	CAPACITY	IMPACTING
762027775	BPAT	BPAT	APSE	71121585	RELOAD	20221117160000PS	20221117170000PS	1	BPAT44100
762027792	BPAT	BPAT	APSE	71121585	RELOAD	20221117170000PS	20221117180000PS	1	BPAT44101
762027806	BPAT	BPAT	APSE	71121585	RELOAD	20221117180000PS	20221117190000PS	1	BPAT44102

#### **Notification Display: Email addresses**



Once saved, validate what you entered on the Notification Page.

- Enter email addresses for all who should be included on the notification.
- Email addresses are only checked for a valid format, not a valid address. They can be sent to anyone.
- Enter as many as needed.

Expand/Collapse	Company Code	Notification Event	Notification Method	Notification Address	Notification Format	Enabled	Lead Days	Repeat Days	Time Of Last Update
						~			
+	APSE	PREEMPTION	mailto:	aaa@bpa.gov	OTHER	Yes			2023-02-06 13:52:14 PS
+	APSE	PTP_SELLER	mailto:	aaa@bpa.gov	OTHER	Yes			2023-02-06 13:53:43 PS
+	APSE	PTP_RENEWAL	mailto:	mxanderson@bpa.gov	OTHER	Yes	1	1	2023-02-09 11:27:55 PS
-	APSE	PTP_CUSTOMER	mailto:	joe_blow@APSE.com	CSV	Yes			2023-03-02 15:31:31 P
	APSE	PTP_CUSTOMER	mailto:	Jack_sprat@APSE.com	CSV	Yes			2023-03-02 15:31:31 PS
	APSE	PTP_CUSTOMER	mailto:	Mother_Goose@bpa.gov	CSV	Yes			2023-03-02 15:31:31 PS

#### **New: Preemption and ROFR Notification**

- Subscribing to PCM notifications was previously done by contacting OATI. This is no longer the case.
- Instead, subscribe yourself using the Notification Event "PREEMPTION".
- The process is the same as for all other Notification Events.
- The Preemption and ROFR User Guide has been updated accordingly. It is available on the Customer Training <u>site</u>.

#### A. Subscribing to PCM Email Notifications

OASIS sends emails to provide notification of status updates for Challengers, Defenders, and Dependents (i.e., Regal and pending Redirects of a Defender) at the beginning and end of the President tion and ROFR process. Contact OATI as follows to subscribe to the PCM notifications.

Send an email to support@oati.net.

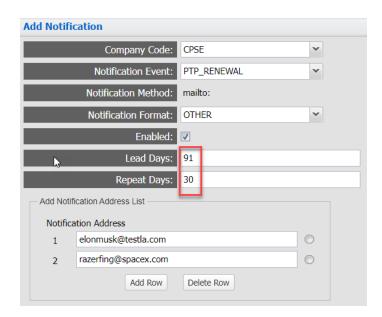
#### **New: Renewal Date Notification**

- Used to notify a Customer that the deadline for submitting a RENEWAL is approaching.
- Customers can configure how far in advance of the Renewal Date they want the first notification and then how often they want repeat reminders.
  - Subscribe using the "PTP\_RENEWAL" Notification Event.
  - Lead Days Defines how many days prior to the corresponding Renewal Date the first notification is sent.
  - Repeat Days Defines how many days between successive reminders.
    - Reminders will continue until either the Renewal Date is reached or the notifications are acknowledged.
    - Acknowledgement can only occur using the OASIS template rolloverupdate to set the RENEWAL\_ACKNOWLEDGED field to "Y".

#### Renewal Date Notification Example



- Reservation with a Renewal Date of 12/02/2023 above.
- Subscribe as shown at the right with Lead Days = 91 and Repeat Days = 30.
- The first notification will be sent 91 days prior (on Sept 2).
- Reminders will then be sent every 30 days (Oct 2, Nov 1, and Dec 1).



#### **New: NITS Notifications**

- Used for notifying of status changes on NITS components (DNRs, Application, Resources, etc).
- Subscribe using the "NITS" Notification Event.
- Use PTP events to get notified for the corresponding NT reservation ("PTP\_CUSTOMER", "PTP\_RENEWAL", "SECURITY\_LIMITS", "PREEMPTION").
- You can also subscribe to NITS notifications using the "Status Notification" field on the NITS Customer.
  - Use the ModifyNITSCustomer transaction.
  - However, only a single email address is allowed here. For this reason, it is recommended to use the "NITS" event instead.



#### **Notification Help**

#### webSmartOASIS Online Help



From the Help menu: Admin -> Notifications



#### BPA Customer Training site:

Preemption and ROFR User Guide

#### **Notification Demonstration**

- Add new Notification Event
  - o PTP\_RENEWAL
- Modify existing Notification Event
  - o PTP\_CUSTOMER

# FERC 676-J: Curtailment Posting on OASIS

Mike Steigerwald

#### **Curtailments Impacting BPA Customers**

#### 3 curtailment types

Curtailment Type	Description	Issued by	Curtailment Tool	
Network	Cut on BPA flow-based paths.	BPAT Dispatch	iCRS (BPA)	
1:1	Cut on BPA 1:1 paths.	BPAT Real-time Scheduling	Curtailment Manager (OATI)	
Interconnec- tion-wide	Curtailments on WECC paths using USF procedures.	Reliability Coordinator ( <i>i.e.,</i> RC West)	webECC (OATI)	

#### **Background on Curtailment Posting**

- Dates back over 15 years to FERC Order 890.
  - This is the last of the Order 890 OASIS requirements.
- FERC wanted to provide transparency to customers about transmission curtailments.
- FERC directed NAESB to develop standards for the posting of curtailment information to OASIS.
- Primary focus of the Order was for TLR events in the Eastern Interconnection.

#### **Prior OASIS Functionality**

- Prior NAESB standards included OASIS templates for curtailment info, but there was no requirement to use these templates.
  - No WEQ-001 Business Practice Standards.
  - There were WEQ-002, 003, and 013 standards.
- Curtailment Manager has posted data to these templates for years on these OASIS screens:
  - Notices -> Security Summary: Security events
  - Reports -> Schedule Summary: Curtailed tags

#### **Overview of New Standards**

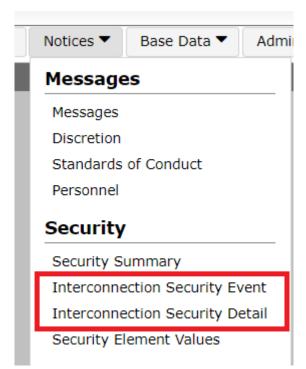
- Apply only to "Interconnection-wide Congestion Management Procedures".
  - This means IDC in the East and webECC in the West.
  - Does not apply to local TP curtailments.
- FERC directive was specifically for Firm curtailments only.
  - However, NAESB determined that the only way to be transparent about Firm curtailments was to also be transparent about Non-firm curtailments too.
  - NAESB standards apply to Firm and Non-firm.

#### Overview of New Standards (continued)

- Slight updates to existing OASIS templates:
  - security: Added some new fields to the template where Security events are recorded (CM page 1).
  - scheduledetail: Added ACTION\_ID (mostly for IDC) to the template for tag curtailment information.
- Added 2 new OASIS templates:
  - securitysummary: Will show overview information from webECC across Providers.
  - o **securitydetail**: Will show specific information for each curtailment action (MW relief, etc).

#### **OASIS** Implementation

- Interconnection-wide curtailment information is being posted to OASIS from both IDC and ECC.
- Added 2 new screens under the 'Notices' menu:
  - Interconnection Security Event
  - Interconnection Security Detail



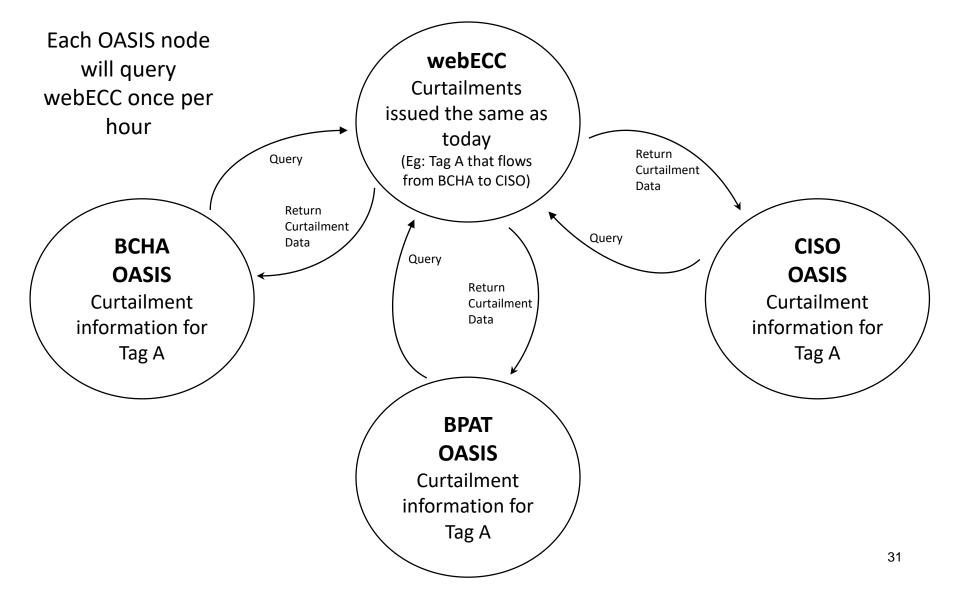
#### **Explanation of Curtailment Screens**

- Security Summary (security):
  - Existing screen that provides overview data each time a curtailment event is triggered. Has both BPAT and ECC data.
  - Filter on Event ID either "BPAT" or "ECC".
- Schedule Summary (scheduledetail):
  - Existing screen with tag data from BPAT curtailments only.
- Interconnection Security Event (securitysummary):
  - New screen that only contains interconnection data from IDC or ECC. No curtailments issued by BPAT. Summary data only.
  - Filter on System for "ECC" data in the west.
- Interconnection Security Detail (securitydetail):
  - New screen that contains tag-specific data from IDC or ECC.
  - For each single Event ID in Security Event, there will be one or many records in Security Detail.

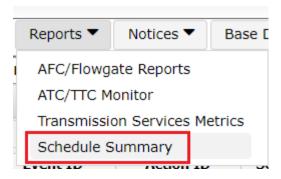
#### **Curtailment Posting Summary**

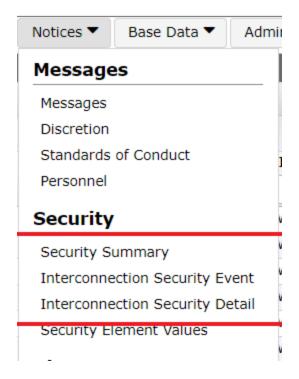
Criteria	Security Summary	Schedule Summary	Interconnection Security Event	Interconnection Security Detail
BPA Flow-based Path	No	No	No	No
BPA 1:1 Path	Yes	Yes	No	No
Inter- connection	Yes	No	Yes	Yes
New	No	No	Yes	Yes
Tag data	No	Yes	No	Yes
Posting Time	Hourly	7 days later	Hourly	Hourly

#### Polling of Curtailment Data from webECC



#### Demonstration of Curtailment Info on OASIS





# FERC 676-J: OASIS List Templates

**Bob Zerfing** 

#### **OASIS List Template: Overview**

#### Old Standard

- Some sophisticated customers query OASIS using templates as an API.
- Some templates were limited in the number of query variables that could be used, resulting in the customer having to make multiple queries.

#### New Standard

- Adds a "list" feature to several templates to make queries more flexible.
- Queries using this "list" feature can include multiple search values in a single query (such as multiple AREFs), which may result in fewer queries being needed.

#### **OASIS List Template: Example**

#### **Old Standard**

- List of up to 4 AREFs separated by &
- ASSIGNMENT\_REF=12345678&ASSIGNMENT\_REF=98765432&ASS IGNMENT\_REF=55555555&ASSIGNMENT\_REF=23242526

#### **New Standard**

- Comma separated list.
- ASSIGNMENT\_REF\_LIST=12345678,23456789,34567890
- Maximum number is limited to 1000 characters.
- 7 templates updated with up to 3 new query variables.

#### **New List Query Variables**

### Additions & Revisions to Existing Business Practice Standard WEQ-003 (OASIS S&CP Data Dictionary) (Additions to be inserted into WEQ-003 in alphabetic order)

WEQ-003-0 Definition of Data Element, Version 2.2								
OASIS Data Dictionary Element Name	Alias	Field Format: minimum characters {type of ASCII} maximum characters	Restricted Values	Definition of Data Element				
ASSIGNMENT_REF_LIST	AREFLIST	1{ALPHANUMERIC}1000	Unique comma separated values	A list of comma separated ASSIGNMENT_REF values.				
REASSIGNED REF LIST	REREFLIST	1{ALPHANUMERIC}1000	Unique comma separated values	A list of comma separated REASSIGNED_REF values.				
RELATED_REF_LIST	RELREFLIST	1{ALPHANUMERIC}1000	Unique comma separated values	A list of comma separated RELATED_REF values.				

#### **OASIS List Template: Scope**

OASIS Template	Description	LIST Data Elements
scheduledetail	Curtailed tags on 1:1 paths.	ASSIGNMENT_REF_LIST
reduction	Reductions in the rights to NT or PTP parent reservations.	ASSIGNMENT_REF_LIST
transstatus	Status of NT or PTP TSRs and reservations.	ASSIGNMENT_REF_LIST REASSIGNED_REF_LIST RELATED_REF_LIST
rollover	Eligible and remaining Rollover Rights on LTF NT or PTP.	ASSIGNMENT_REF_LIST
ссо	Conditional Firm conditions.	ASSIGNMENT_REF_LIST
QueryNITS Request	Summary status of any NITS request.	ASSIGNMENT_REF_LIST
QueryNITS Request Details	Detailed status of any NITS request.	ASSIGNMENT_REF_LIST

### Recent Business Practice Updates

Mike Steigerwald

#### **Redirect Business Practice v27**

- Prior BPs: Cautioned against submitting multiple
   Redirects against a parent reservation at the same time.
- This was due to a long-standing "timing gap" (due to NAESB) in OATI software that could allow confirmation of multiple Redirects that together exceeded the parent.
- OATI has closed that gap. However, Customers are still cautioned to monitor their parent usage accordingly.
- BP 27 language has been updated.
  - It is the Customer's responsibility to not exceed the capacity reserved in the Parent Reservation.
    - a. Exceeding the capacity reserved may result in an Unauthorized Increase Charge when a schedule(s) exceeds the reservation capacity rights as described in the Unauthorized Increase Charge (UIC) Business Practice.
    - b. Customers are responsible to monitor submittals of multiple Redirect TSRs against the same Parent Reservation at approximately the same queue time, as this may result in exceeding the capacity reserved in the Parent Reservation.

#### TSR Evaluation Business Practice v3

- The ATC evaluation of Redirects has been updated to ensure that a Redirect that provides counterflow to a flowbased path will never fail for insufficient ATC.
- The logic calculates a "net impact" of the Redirect. Before, if the "net impact" was positive (Redirect needs more ATC than the parent), the TSR would fail if ATC was <= zero.</li>
- Previously, there was a narrow scenario in which such a Redirect could fail...even if it provided counterflow.
  - Both Redirect and parent provide counterflow, but Redirect provides less counterflow -> "Net Impact" was positive.
- 13. For evaluation of any Firm Redirect not considered *de minimis*, the ATC evaluation credits the Redirect with capacity available from the Firm Parent Reservation on any flow-based paths held in common between the Parent Reservation and the Redirect. ATC is needed on any flow-based path in which the Redirect impact is positive and exceeds the rights held on the Parent Reservation (i.e., the net impact of the Redirect is also positive).

### Other Stuff

Mike Steigerwald

#### **Uncommitted Capacity for Pending Redirects**

- OATI has closed a gap that has existed for 10+ years.
- A pending Redirect should not reduce the capacity available on the parent that is available for other uses.

The Transmission Provider shall reduce the Uncommitted Capacity of the Parent Reservation by the amount of the redirected capacity granted for the time period of that Redirect upon confirmation of the request to Redirect on a firm basis. An example is shown in Business Practice Standard WEQ-001-B.

- Example: 100MW parent with a 100MW Redirect that is not pre-confirmed. 100MW of the parent is available for other uses (e.g., tagging) while the Redirect is pending.
- CAUTION: Customers are responsible for ensuring parent capacity is not exceeded when manually confirming the Redirect.

#### **OASIS Security**

- HTTPS will be required to access Production OASIS starting on 03/29/23.
- Access via HTTP will be blocked.
- This change also applies to programmatic access using OASIS templates.
- Customers will need to change all of their bookmarks and API's that are not already using HTTPS.
- Blocked: <a href="http://www.bpa.oati.com/bpa">http://www.bpa.oati.com/bpa</a>
- Allowed: <a href="https://www.bpa.oati.com/bpa">https://www.bpa.oati.com/bpa</a>