



**RECOMMENDATION TO NAESB EXECUTIVE COMMITTEE  
For Quadrant:**

**Requesters:** OASIS Subcommittee  
**Request No.:** 2015 API 5.d R09015  
**Request Title:** Create a new OASIS mechanism that allows for the merger of like reservations without the use of the resale mechanism

**1. RECOMMENDED ACTION:**

- Accept as requested
- Accept as modified below
- Decline

**EFFECT OF EC VOTE TO ACCEPT  
RECOMMENDED ACTION:**

- Change to Existing Practice
- Status Quo

**2. TYPE OF DEVELOPMENT/MAINTENANCE**

**Per Request:**

- Initiation
- Modification
- Interpretation
- Withdrawal
- Principle
- Definition
- Business Practice Standard
- Document
- Data Element
- Code Value
- X12 Implementation Guide
- Business Process Documentation

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**3. RECOMMENDATION**

**SUMMARY:**

R09015

Transmission Customers may from time-to-time may have a portfolio of transmission service reservations from a single provider on a single path. For ease of tracking and efficiency, the customers desire to combine or merge like reservations (i.e., firm, non-firm, etc) into a single reservation. Under existing OASIS business practices and protocols, customers must use the Resale mechanisms to merge two or more like reservation under a single assignment reference number. In other words, customers sell their reservations back to themselves.

While use of the resale mechanism gives the customer a single reservation to manage, it is not desirable because: 1) the use of Resale to merge reservations presents a false picture of what is really happening, and 2) Transmission Providers



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must report all resales to FERC and establish transmission reassignments agreements with the assignee.

This request is for a new OASIS mechanism (a combination of business practices and protocols) that allows for the merger of like reservations without the use of the resale mechanism and resulting the additional contracting and administrative requirements (for additional details refer to FERC Order 890).

To view the full request click here: [r09015.doc](#)

Add language to address the association to STCP

The Consolidated reservation will not be an Original request, but will be a reservation in which capacity and scheduling rights can be grouped together to allow for customers more streamlined ability to manage transmission inventory. The rights will effectively be transferred from the parent reservation to the consolidation reservation and the consolidation reservation will have the ability to redirect or Resale according to current BPS's. It is expected that due to the nature of the consolidated reservation being unconditional, the consolidated reservation will not be subject to STCP as a Challenger or a Defender.

Field Code Changed

**Revisions to Existing Business Practice Standard WEQ-000 and WEQ-001**

**RECOMMENDED STANDARDS:**

**WEQ-000 Definition change:**

Resale - The request to convey scheduling rights associated with a reservation for PTP from a Reseller to an Assignee in the (secondary) transmission market, where the Reseller and the Assignee are not the same Transmission Customer.

Resale (current standard) - The request to convey scheduling rights associated with a reservation for PTP from a Reseller to an Assignee.

Reseller - The Transmission Customer that holds PTP rights and offers those rights for sale to another Transmission Customer on the (secondary) transmission market.

Reseller (current standard) - The Transmission Customer that holds PTP rights and offers those rights for sale on the (secondary) transmission market.

Consolidation – The ability for a Transmission Customer to combine all or a portion of their Firm PTP reservations.

Uncommitted Capacity – The granted capacity of a PTP reservation at the time of Transmission Customer confirmation (CAPACITY GRANTED) less all confirmed reassignments (e.g., Resales), confirmed Redirects on a firm basis, confirmed Redirects on a non-firm basis, Consolidations, displacements, approved schedules, and consolidations.



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Uncommitted Capacity(current standard) – The granted capacity of a PTP reservation at the time of Transmission Customer confirmation (CAPACITY GRANTED) less all confirmed reassignments (e.g., Resales), confirmed Redirects on a firm basis, confirmed Redirects on a non-firm basis, displacements, and approved schedules.

**WEQ-001-XX Consolidation**

Transmission Provider shall provide a Transmission Customer the ability to consolidate all or a portion of multiple transmission reservations into a single transmission reservation of type Consolidation.

**XX.1 Transmission Reservations to be consolidated**

The Consolidated Reservations will be an Original Request of type Consolidation, this request would not be eligible for STCP and would not be evaluated as a Challenger or a Defender.

XX1.1 All transmission reservations being consolidated must be Unconditional

XX1.2 Suggested wording change:

Option 1: The Transmission Service attributes of the request to consolidate on a firm basis must correspond to valid firm PTP offered by the Transmission Provider; however, the duration (start/stop time) may be as noted in Business Practice Standard WEQ 001-9.7.4

Option 2: All transmission reservations being consolidated must have ~~similar~~ the following attributes: (eg. Class, Type, Subclass, Period, Window

1.PTP

2.FIRM

1.2.1

Option 3: A request for Consolidation on a firm basis must represent an established firm PTP SERVICE INCREMENT (e.g., DAILY, MONTHLY, etc.) offered by the Transmission Provider. XX1.2.1 All Transmission reservations being consolidated do not have to be the same Service Incre

Option 2: Minimum Consolidation duration is equal to smallest firm increment (e.g.daily)

Option 7: The Consolidation shall have the right to aggregate multiple reservations into a single Consolidation provided that each reservation being aggregated is of exactly the same service attribute, priority, product and POR/POD. Long-term firm PTP reservations or any other reservations subject to the terms of a CCO may not be aggregated to support a Consolidation.

**Comment [BPA\_USER1]:** Updated per Issue 5, new request type for consolidation. 7/13/2015 map

**Comment [JTW2]:** 6/17/15 Need to make it more specific

**Comment [BPA\_USER3]:** Removed "similar" and added types of reservations that can be consolidated.

**Comment [BPA\_USER4]:** Added to clarify the attributes required and be consistent with WEQ 001-9.3.2.

**Comment [JTW5]:** 6/16/15 what will the system attributes (e.g. increment) be after the consolidation takes place? System attribute for the consolidated reservation shall be inherited from the parent reservations and shall be consistent with all other requirements in WEQ XXX

**Comment [BPA\_USER6]:** Use examples to help determine which is the best course of action for determining which attributes are used on the consolidation reservation.



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- ~~XX1.3~~ All transmission reservations being consolidated must have the same POR and POD.
- ~~XX1.3.1~~ If TP requires Source and Sink to be identified in the Transmission reservation, the Transmission Customer shall include the Source/Sink data in the Consolidation as well.
- ~~XX1.4~~ The Transmission Customer shall be allowed to request a Consolidation on a firm basis for a portion or all of the Uncommitted Capacity, even if the transmission scheduling rights on the Parent Reservation have been limited due to outages or other reliability-related events. An example is show in Business Practice Standard WEQ-001-X
- ~~XX1.5~~ Option 1: The Transmission Customer shall be allowed to request a Consolidation on a firm basis for a portion or all of the time period of the Parent Reservation (i.e., bound by the start/stop times of the Parent Reservation). An example is show in Business Practice Standard WEQ-001-X
- ~~XX1.6.1~~ Option 2: ~~XX1.6.1~~ The Consolidated Reservation must be within the bounds of the Parent Reservation(s) that are designated as supporting the Consolidation.
- ~~XX1.5.1~~ The transmission reservations being consolidated are not required to be a flat profile.
- ~~XX1.5.2~~ The earliest start time for the Consolidated reservation will be the earliest start time of the Parent transmission reservations.
- ~~XX1.5.3~~ The latest stop time for the Consolidated reservation will be the latest stop time of the Parent transmission reservations.
- ~~XX1.6.1~~ The Transmission Customer shall not confirm any request to Consolidate on a firm basis that would exceed the Uncommitted Capacity at that point in time (i.e. At the time of attempted confirmation and over the time interval of the Consolidation). The Transmission Provider shall have the right to ~~XXXX~~ any such confirmation.
- ~~XX1.6.2~~ The Transmission Customer should withdraw any request to Consolidate on a firm basis that would exceed the Uncommitted Capacity at that point in time (i.e., at the time of attempted confirmation and over the time interval of the Consolidation). The Transmission Provider shall have the right to withdraw their acceptance or otherwise deny any request to Consolidate on a firm basis that cannot be confirmed due to limitations in the Uncommitted Capacity by setting the transaction STATUS Data Element to the value of SUPERSEDED. The transmission reservations being consolidated are not required to be a flat profile.
- ~~XX1.4.1~~ The earliest start time for the Consolidated reservation will be the earliest start time of the Parent transmission reservations.
- ~~XX1.4.2~~ The latest stop time for the Consolidated reservation will be the latest stop time of the Parent transmission reservations

**Comment [JTW7]:** 6/16/15 this needs to be discussed further for por/pod combinations.

**Comment [BPA\_USER8]:** Language added to be consistent with redirect standard wording 001-9.2 and 001-9.3 in regards to "all or a portion of" Issue 9.

**Comment [BPA\_USER9]:** Language added to be consistent with redirect standard wording 001-9.2 and 001-9.3 in regards to "all or a portion of" Issue 9.

**Comment [JTW10]:** 6/16/15 might need to move this to the 1.4 section due stop/start time

**Comment [BPA\_USER11]:** Do we actually need this called out? MAP 7/13/2015

**Comment [BPA\_USER12]:** Added for consistency with WEQ 001-9.5.1



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~~XX1.57~~ ~~The result of a Consolidated Reservations are shall not allowed to be for more than 364 days in duration.~~

**Comment [JTW13]:** 6/16/15 we will come back to this standard to discuss the intention of this standard for duration of the term of service.

~~XX1.86~~ A Transmission Provider shall impose restrictions regarding the timing of a Consolidation, either submission times or service duration, consistent with WEQ 003-4.2 as well as the TP's Business Practices. ~~XX1.6.1 The Consolidated Reservation must be within the bounds of the Parent Reservation(s) that are designated as supporting the Consolidation~~

**Comment [JTW14]:** 6/16/15 TP will need to establish a timing table for the consolidation.

**Comment [JTW15]:** 6/16/15 might need to move this to the 1.4 section due stop/start time

XX1.79 A Consolidation must be in whole MWs equal to or less than the granted capacity (~~Uncommitted Capacity~~ ~~Capacity Available to Redirect~~) of the Parent Reservations, less any reductions (e.g. confirmed Redirects, previous Resales, Curtailments, or implemented schedules) to the capacity available for scheduling of that Parent Reservation consistent with XX1.4(non-flat profile).

**Comment [BPA\_USER16]:** Updated term in recommendation for redirects. This is the current Ver 3 BPS's.

~~XX1.9~~ ~~Displacement of a Consolidation~~  
~~XX1.9.1 Consolidated reservations are unconditional and therefore are not eligible for displacement due to STCP~~

**Comment [JTW17]:** 6/16/15 since this talks about the displacement of the consolidation this should be moved up into section 1.

~~XX1.10~~ ~~CCO's shall not be allowed to be consolidated.~~

**XX.2 Redirect and Resale of Consolidation Reservation**

**Redirects and Resales from a Consolidated request or reservation is subject to the same processing mechanism as any other firm request or reservation.**

~~XX2.1~~ The consolidated reservation shall have the right to Redirect in accordance with this Business Practice Standard WEQ-001-XX subject to Business Practice Standards WEQ-009 and WEQ-010.

**Comment [JTW18]:** 6/16/15 may need address these two additional issues 1) consolidations of resales. 2) Consolidations of consolidations.

**XX2.1.1 Redirect of Consolidation**

Transmission Customer shall have the right to Redirect rights associated with a Consolidation. Any such request shall be submitted directly to the Transmission Provider and will be queued and evaluated in the same manner as any other Redirect. (Subject to any limitations otherwise identified in these Business Practice Standard WEQ-001).

XX2.1.2 Transmission Customer shall be obligated directly to the Transmission Provider for any charges or credits resulting from any Redirect.

~~XX2.1.3~~ ~~Displacement of a Consolidation~~

~~XX2.1.3.1 Consolidated reservations are unconditional and therefore are not eligible for displacement due to STCP (WEQ XXX).~~

**Comment [BPA\_USER19]:** Should XX2.1.2 be moved under section XX4. Financial Obligations since it outlines financial responsibility??

**Comment [JTW20]:** 6/16/15 since this talks about the displacement of the consolidation this should be moved up into section 1.

XX2.2 The Consolidated Reservation shall have the right to resell subject to Business Practice Standard WEQ-001-11.



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XX2.3 The Consolidated Reservation shall not have Rollover Rights.

**Comment [JTW21]:** 6/16/15 since this talks about the displacement of the consolidation this should be moved up into section 1.

**XX.3 Treatment of Parent**

XX3.1 Upon confirmation of the Consolidated Reservation, all rights for the time frame and in the amount of the consolidation will be removed from the parent reservations to the consolidated reservation(s).

**Comment [JTW22]:** 6/16/15 need to discuss the ability to make this a process for approval.

XX3.2 If the Transmission Provider determines that the consolidated reservation is invalid, the TP has the right to nullify/refuse the consolidated reservation and return all rights to the parent reservation(s).

**XX.4 Posting on OASIS**

XX4.1 All Consolidations shall be requested and posted on OASIS

XX4.2 All Consolidations must include the price associated to the parent reservation.

**Comment [JTW23]:** 6/16/15 questions that need to be answered here 1) What price is this. 2) Does this need to be here

**4. SUPPORTING DOCUMENTATION**

**a. Description of Request:**

2015 Annual Plan Item 5.d for the WEQ OASIS Subcommittee.

**b. Description of Recommendation:**

**c. Business Purpose:**

**d. Commentary/Rationale of Subcommittee(s)/Task Force(s):**