

Appendix A

Service Across Multiple Transmission Systems (SAMTS) Reference Document

Version 4

A. SAMTS Groups

1. A SAMTS TSR is part of a coordinated group involving one or more TPs. BPA TS requires multiple TPs to be involved for a coordinated group.
2. Eligible requests include LTF-Yearly PTP, STF-Monthly PTP, NF-Monthly PTP, LTF-Yearly NT, STF-Monthly NT or NF-Monthly NT.
3. The customer will have 24 hours from the TSR queue time to update the CG Status field to ATTESTED.
4. The TP cannot update the status to CR_COUNTEROFFER or CR_ACCEPTED until the customer updates the status to ATTESTED. The system is set up to automatically change status to INVALID if the customer does not attest within the first 24 hours.
5. The TP can, however, change the status of the TSR to a dead state at any time per BPA TS' business practices. For example, the TSR can be marked as INVALID if there is no Sale Ref identified. The TSR can also be marked as REFUSED if there is no ATC.

B. Creating a SAMTS Group

1. The customer creates multiple TSRs in OASIS that are to be joined into a group. Within each TSR, the CG Status must be set to PROPOSED (the initial status) and the TSR must be Preconfirmed (an error will appear if a PROPOSED TSR is not Preconfirmed).

Note: The CG_Status cannot be added after the TSR is submitted.

Reservation Entry Form

BPAT Time Zone: PD

Pricing: BPAT

Update BPAT Info

BPAT: Select Provider | Scenario Analyzer | Enter TSR | Clear Form | Save As Template | Close

Seller	Source Sink *	POR	POD	Service *	Request Type	Start	Stop	MW	Bid Price
BPAT	CALIFOREBRDR JOHNDAYINT500	COB	JOHNDAY	LTF-YEARLY PTP	ORIGINAL	06/01/2015 00 : 00	06/01/2016 15 : 00		1479.0000

Customer: APSE | Path * | **Preconfirmed**

Rollover Waived: [Dropdown]

CG Status: PROPOSED

Posting Ref: [Field]

Sale Ref: 12345

Reservation Profile: 25Hr 24Hr H D W M Y Other Peak

Create

2. Note that there are new columns available in the OASIS reservation display, CG Status and CG Deadline. They can be added to the reservation display via the Columns button. They can also be used to filter TSRs via the More Filtering button.
 - a. CG Status will either be PROPOSED or ATTESTED.
 - i. PROPOSED is initially selected by the customer to alert BPA TS that this request is part of a SAMTS group.
 - ii. ATTESTED is selected by the customer within the Customer Update screen (step 12); it indicates that contiguity requirements have been met.
 - b. CG Deadline indicates the deadline for the customer to attest the group.
 - i. The deadline will be 24 hours from the request’s QUEUED time.
 - ii. It will be automatically set by OASIS.

Assign Ref	Queued Time	Request Type	CG Deadline	CG Status	Rollover Waived	Concom Eval Flag	Customer	MW Req	MW Grant	POR	POD	Service
69820495	2015-05-05 14:44:53 PD	ORIGINAL	2015-05-06 14:44:05 PD	PROPOSED			APSE	1		BC US BORDER	BIGBEND	F-HOURLY PTP
69820494	2015-05-05 14:44:05 PD	ORIGINAL	2015-05-06 14:44:05 PD	PROPOSED			APSE	1		COB	JOHNDAY	LTF-YEARLY PTP
69820493	2015-05-05 14:43:29 PD	ORIGINAL	2015-05-06 14:43:29 PD	PROPOSED			APSE	1		COB	JOHNDAY	LTF-YEARLY PTP

3. Click the PROPOSED hyperlink in the CG Status column to open the New Coordinated Group window. These steps will need to be repeated for each TSR to be grouped together (YEARLY and MONTHLY only).

TP	AssignRef	Increment	Class	Type	Window	Period	Subclass
BPAT	69820545	YEARLY	FIRM	POINT_TO_POINT	EXTENDED	FULL_PERIOD	

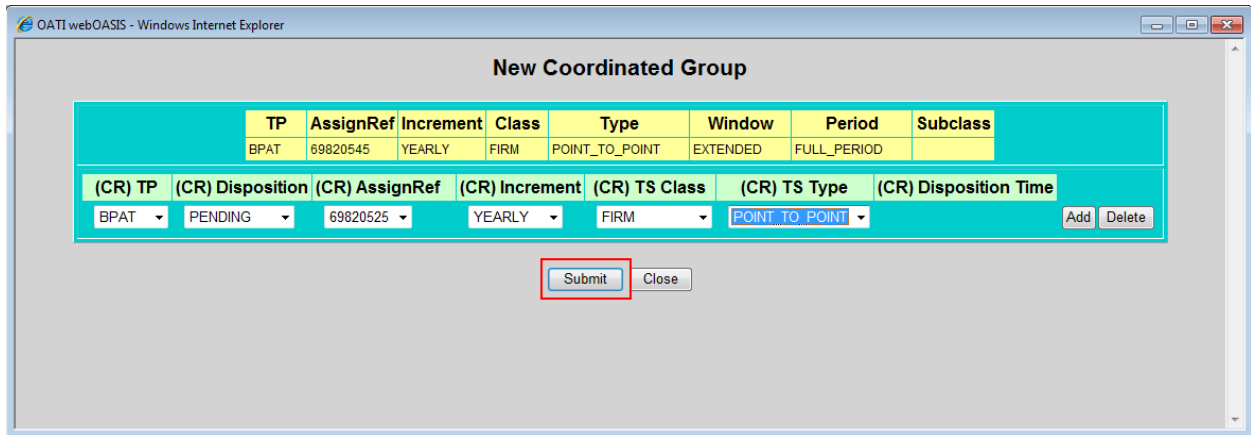
(CR) TP: BPAT
 (CR) Disposition: PENDING
 (CR) AssignRef:
 (CR) Increment:
 (CR) TS Class:
 (CR) TS Type:
 (CR) Disposition Time:

Buttons: Add, Delete, Submit, Close

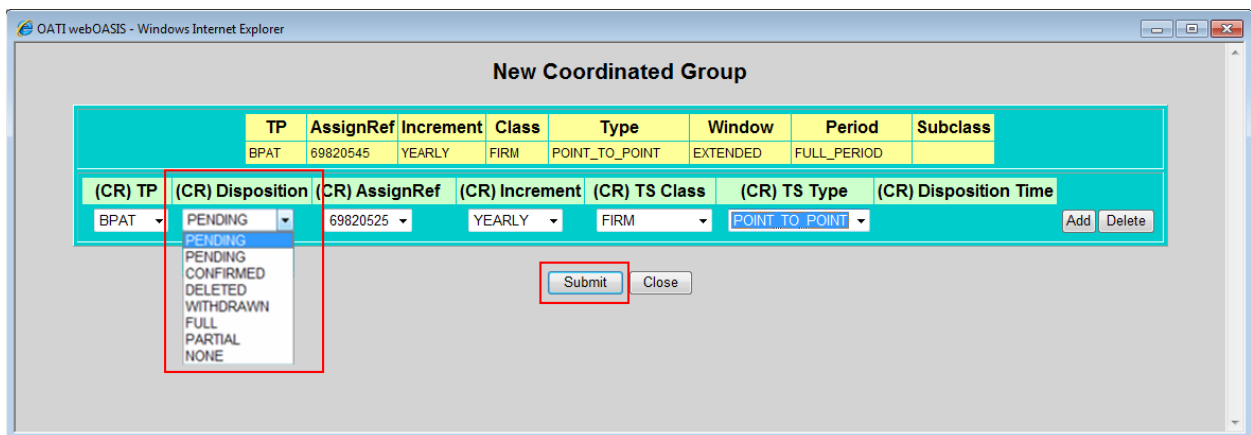
4. Select a TP in the (CR) TP field. Note that the default TP is BPA TS. The user may add a TP by selecting “Other...” from the dropdown menu and manually entering the TP’s acronym.
5. Select a (CR) Disposition status from the dropdown menu.
 - a. PENDING – select this status if entering a TSR that is part of a CG group on another TP’s system.

- b. CONFIRMED – select this status if including an existing reservation as part of the CG group. This option will not be available when the TSR is ATTESTED.
 - c. DELETED - select this if the TSR needs to be removed from the CG group. This option will not be available when the TSR is ATTESTED.
6. Enter an AREF into the (CR) AssignRef field.
 7. Select an increment from the (CR) Increment dropdown menu.
 8. Select a class from the (CR) TS Class dropdown menu.
 9. Select a type from the (CR) TS Type dropdown menu.
 10. Click the Add button to add additional TSRs to the coordinated group.
 11. Click the Delete button to remove extra rows as needed. The customer will need to select DELETED from the (CR) Disposition dropdown to remove a TSR from the group.
 12. Repeat steps 4 -9 as needed for each additional TSR to be included in the coordinated group.

Note: A coordinated group is not considered valid until there are at least 2 different TPs within the group. At least one of the (CR) AssignRefs must be PENDING when attesting the group.



13. Click Submit after adding all desired TSRs.
14. Update the (CR) Disposition as appropriate for the TSR(s) in question. Click Submit when finished.



- Once contiguity requirements have been met, enter each TSR and click Customer Update button. Change the CG Status to ATTESTED. Click Submit Changes when finished.

Customer TSR Update 69820016 QUEUED

Submit Changes Close

Status Comments
Customer Comments
Anc-Link
Status Notification

Preconfirmed Yes

New Status QUEUED

CG Status PROPOSED
PROPOSED
ATTESTED

Add Row Delete Row Original Profile

Reservation Profile							
Row	Start	Stop	MW Req	MW Grant	MWH	Bid Price	Offer Price
1	04/01/2015 00:00 PD	04/01/2016 00:00 PD	5.00		43920	1479.00	
Profile Total:					43920		

Add Row Delete Row Original Profile

This will change the CG Status in the TSR to ATTESTED. This must be completed prior to the 24 hour CG_Deadline; otherwise the TSR will automatically be set to INVALID for not meeting timing requirements.

- BPA TS will evaluate the coordinated request and update the status to CR_ACCEPTED if the request can be granted in full or to CR_COUNTEROFFER if a partial offer is available. The TSR can automatically be placed in a dead state if ATC is not available or the request fails initial validation checks.

The Response field will be populated for the TSR when the customer updates all the TSRs to a non-PENDING state in the (CR) Disposition field of the TSR.

Seller	Source Sink	Per Pod	Request Type	Start	Stop	MW Req	MW Grant	Bid Price	Offer Price	Ceiling Price	Price Unit
BPAT	BELL230 BIGBENDNDP	AVA BPAT BIGBEND	ORIGINAL	2015-08-01 00:00:00 PD	2016-08-01 00:00:00 PD	0	0	1741.0000	1741.0000	1741.0000	\$/MW-MONTH
Service	Increment	TS Class	TS Type	TS Period	TS Window	TS Subclass					
LTF-YEARLY NT	YEARLY	FIRM	NETWORK	FULL_PERIOD	SLIDING						
Path:		Preconfirmed: Yes	Competing: N	Negotiated:	Nerc Priority: 7	Other Priority:	Affiliate: NO	Submission Mask: 0	Impacted: 0		
Comments			Times	References	Overrides						
Status				Queued	2015-05-07 16:57:50 PD	Deal			Queue Order		
Seller				Updated	2015-05-08 08:40:00 PD	Sale	76543			Lottery Order	
Provider				Response	2015-05-08 08:40:00 PD	Posting			Economic Flag		
Customer Impacted	OASIS AUTO ACTION: Enforcing Response Time Limit expiration. Setting status to CONFIRMED.			Re-Start		Request			Excluded	NO	
Reservation Type				Re-Stop		Reassigned			Competition State		
Provider Approval				Effective Queued		Seller			Nerc Priority		
CG Status	ATTESTED			Loss Option		Related			Other Priority		
				Confirmation Time	2015-05-08 08:40:00 PD	Rollover Waived			CG Deadline	2015-05-08 17:57:50:000	
								Status Notification			
								Anc-Service-Link			

The TSR will automatically be CONFIRMED if the customer does not respond in time when the status is CR_ACCEPTED. The request will automatically be RETRACTED if the customer does not respond in time to a CR_COUNTEROFFER.

C. REBIDS for SAMTS TSRs

1. A Customer may REBID capacity of a coordinated TSR in a CR_ACCEPTED or CR_COUNTEROFFER state when any TSR in the coordinated group is denied or the capacity offered is less than the capacity requested.
2. A Customer cannot REBID if all of the TSRs in the coordinated group are CONFIRMED as requested.
3. For applicable time limits concerning REBIDs, see the Reservation Response Timing Requirements Table in the Requesting Transmission Service Business Practice.