

Long-Term Firm Queue: Evaluation of Requests and Offer of Service

BPA Transmission Business Practice

Version 17

6/1/2019

Long-Term Firm Queue: Evaluation of Requests and Offer of Service

Version 17

This Business Practice describes the evaluation and handling process of Long Term Firm (LTF) Transmission Service Requests.

NOTE: In some instances, such as the System Impact Study (SIS), the policies and guidelines in this Business Practice do not apply to Transmission Service Requests (TSRs) received as part of BPA Transmission Services' (BPA TS) 2008-2010 Network Open Season (NOS) processes. Refer to 2008, 2009, and 2010 Network Open Season Bulletins for information specific to how BPA TS will process 2008, 2009, or 2010 NOS requests.

OATT Policy Reference

- [Section II: Point-to-Point Transmission Service 2.2, 13.2, 15.2, 15.4, 17.7, 19, 27](#)
- [Section III: Network Integration Transmission Service: 32.3](#)
- [Attachment C](#)

For more information, visit the [BPA Transmission Business Practices page](#) or submit questions to techforum@bpa.gov.

Table of Contents

A. Request for Pre-Evaluation of Transmission Service Requests (What-If)	1
B. Evaluation of LTF TSRs	2
C. Offering Transmission Service	3
D. Provisions for a LTF TSR Approaching the Requested Stop Date	5
E. Specific Provisions	8
F. Environmental Review	9
G. Generation Interconnection Process	9

A. Request for Pre-Evaluation of Transmission Service Requests (What-If)

1. BPA TS offers a pre-evaluation (What-If) to customers wanting to determine whether there is sufficient ATC across specific points on BPA's Transmission System before submitting a LTF TSR over OASIS.

- a. All LTF TSRs with the exception of Renewals, Deferrals, and Transfers require additional Facility and System assessments such as Subgrid checks to determine if an offer of service may be granted.
 - b. What-Ifs are based only on Available Transfer Capability on the date the What-If is performed. No additional Facility or System assessment is included in the What-If.
 - c. What-Ifs are strictly a “Snapshot” in time on the date the What-If is performed.
2. To request a What-If, the Customer must complete all fields of the [Transmission Reservation & Available Transfer Capability \(ATC\) Analysis Request \(Analysis Request\) form](#).
 3. Email the completed Analysis Request to tblresdesk@bpa.gov and include the Customer’s assigned Transmission Account Executive (AE) in the distribution list.
 - a. For AE assignment, see [Becoming a BPA Transmission Services Customer](#).

B. Evaluation of LTF TSRs

1. BPA TS calculates the ATC impact of each Point to Point (PTP) and Network (NT) LTF TSR based on the Available Transfer Capability (ATC) Methodology and associated Power Transfer Distribution Factor (PTDF) calculated for each of the Network Flowgates, external interconnections, or interties identified at the time of the evaluation.
 - a. BPA further evaluates each LTF TSR impacting Network Flowgates to determine whether the PTDF calculated impact for each Network Flowgate is an appropriate reflection of the ATC impact anticipated if the LTF TSR were CONFIRMED.
 - b. For details on determination of the PTDF calculated impact see “ATC Methodologies for the Planning Time Period” documents.
 - c. For requirements on the submission of supplemental information for NT TSRs see Requesting Transmission Service Business Practice.
2. Transmission service is offered to the Customer based on the ATC impact on each flowgate and the position in the LTF pending queue.
 - a. Priority order is established by the queue time of the LTF TSR. OASIS assigns the TSR an Assignment Reference (AREF) when the Customer submits a LTF TSR.
 - b. The status of the TSR will change from QUEUED to RECEIVED once BPA TS validates the information in the required OASIS TSR fields.
 - c. ATC is encumbered for LTF TSRs based on priority order. BPA TS continues to encumber ATC for a LTF TSR in the pending queue until an offer of service is either CONFIRMED by the Customer or released.
3. LTF TSRs over the Network, Southern Intertie, and the Montana Intertie must be submitted as separate requests for transmission service and are evaluated independently.
4. BPA TS evaluates each LTF TSR to determine whether it has sufficient ATC to fulfill the request. This evaluation includes consideration of the following factors:

- a. Queue Time of the TSR;
- b. Capacity (megawatts (MW)) requested;
- c. Requested Service Commencement and Termination Dates, and resulting duration of requested transmission service;
- d. OASIS Source and OASIS Sink;
- e. Generation facilities and/or load to be served, if specified in the request;
- f. Type of request submitted (i.e. an ORIGINAL, REDIRECT, RENEWAL, or DEFERRAL request);
- g. Impact on constrained Network Flowgates, external interconnections, or interties determined as described above;
- h. Posted LTF ATC; and
- i. Impacts on the sub-grid and/or local area system that could potentially cause constraints between the Point of Receipt (POR) and Point of Delivery (POD) as determined by BPA TS.

C. Offering Transmission Service

1. BPA TS will offer a Customer an Exhibit to its transmission service agreement once BPA TS determines there is:
 - a. Sufficient LTF ATC on impacted Network Flowgates, external interconnections, or interties; and
 - b. No sub-grid or local area issue(s).
2. If BPA TS is able to make a full service offer to the Customer:
 - a. BPA TS will send the Customer an electronically signed original of the contract for transmission service (Exhibit).
 - b. The Customer must sign and return the original Exhibit to BPA TS within 15 calendar days of the Date of Tender of the Exhibit to the Customer.
 - c. If the Customer fails to sign and return the original Exhibit within the specified timeframe, BPA Transmission Services will change the OASIS status of the TSR to DECLINED, which is a final state, and the TSR will receive no further consideration.
 - d. If the Customer signs and returns the original Exhibit within the specified timeframe:
 - i. BPA TS will verify that the signed original matches the documents that were originally sent to the Customer.
 - ii. BPA TS will change the OASIS status of the TSR to ACCEPTED.
 - e. Except as provided – in 2.f., the Customer must place the TSR in CONFIRMED status no later than Close of Business 15 Calendar Days after the date BPA TS changes the OASIS status of the TSR to ACCEPTED. If the Customer does not place the TSR into CONFIRMED status within the specified time limit, the TSR status will automatically be changed to RETRACTED, which is a final state, and

the TSR will receive no further consideration. If the TSR is Preconfirmed, the TSR status will automatically be updated from ACCEPTED to CONFIRMED status. When the Customer places the TSR in CONFIRMED status, the TSR is binding.

- f. The Customer may REBID a non-Preconfirmed TSR that is in ACCEPTED status. If the Customer submits a REBID, BPA TS will revise the Exhibit to reflect the reduced capacity due to the REBID and proceed again with steps a through e, above.
3. If BPA TS is able to make a partial service offer, it will process Partial Service offers per the Processing Partial Service Offers section of the Partial Long-Term Firm Business Practice).
 4. Upon receiving a Completed Application as defined in the tariff, BPA TS will change the status of the TSR to STUDY. This status may or may not involve a requirement for the Customer to execute further study agreements.
 5. Within 30 days of receiving a Completed Application, BPA TS will respond to the Customer with either an offer or notice that an offer cannot be made at this time.
 6. BPA TS will tender the Customer any and all agreement(s) identified in section 9 below if it is determined that they are required prior to offering the Service Agreement to the Customer.
 7. The Customer must execute and submit a tendered agreement to BPA TS to retain its eligibility for an offer of LTF Transmission Service in accordance with the following timelines:
 - a. SIS Agreement - 15 calendar days from date of receipt by the Customer
 - b. System Facility Study (SFS) Agreement – 15 calendar days from date of receipt by the Customer
 - c. Environmental Compliance Agreement (ECA) and other environmental agreements – 30 calendar days from date of receipt by the Customer
 - d. Construction Agreement – 30 calendar days from date of receipt by the Customer
 - e. Financial Agreement – 30 calendar days from date of receipt by the Customer.
 8. Failure to submit a signed agreement or other required documents to BPA TS within the timeframe specified above will result in the transmission request being designated DECLINED on OASIS.
 9. BPA TS will postpone tendering a Service Agreement until all appropriate studies are completed or the need for the study is mitigated in some manner, if the Customer's request for LTF Transmission Service requires BPA TS to perform a study or studies or for the Customer to participate in one or more facility reinforcements and/or modifications. During this time, the Customer's request will retain its eligibility for an offer of Transmission Service.
 - a. Studies can be completed in two to 12 months if the requested service requires an operating nomogram limit within the rating of a WECC rated path.
 - b. Studies usually take 12 to 18 months to obtain a new WECC path rating if the requested service requires an increase in the rating of a WECC rated path.

10. Subject to ATC, for a LTF Transmission Request whose remaining duration is less than a year but 60 days or more from the requested service termination date, the offer of LTF Transmission Service will be for the remainder of the requested term.
11. If BPA TS cannot offer a Customer a Service Agreement, it may require the Customer to participate in more than one Transmission System upgrade and/or addition to alleviate system constraints on more than one affected Network Flowgate(s) or external interconnection(s).
12. BPA TS may provide each Customer a Financial Agreement that contains an initial estimate of its share of the cost of the project if multiple Customers have requested LTF Transmission Service across Network Flowgates, external interconnections, or interties that require Transmission System reinforcements and/or modifications to provide the necessary transmission capacity, and BPA TS decides to undertake the effort with financing from multiple parties. If no Financial Agreements are offered, BPA TS will provide each Customer an initial estimate of its share of the costs of the project in a Construction Agreement.
13. Subject to ATC and except for provisions implemented as part of OATT Sections 2.2 and 17.7 of the Tariff, and section 12 above, BPA TS will establish the Service Commencement Date as the later of:
 - a. The original Service Commencement Date requested by the Customer; or
 - b. The date on which construction of any required Direct Assignment Facilities and/or Network Upgrades is completed on the Transmission Network, external interconnections, or interties, whichever are applicable to the request.
14. An offer of transmission service may be made to a LTF TSR lower in the pending queue, while the higher positioned request is still pending pursuant to the following:
 - a. The lower positioned TSR will not utilize ATC over any Network Flowgates, external interconnections, or interties that has been encumbered for the higher positioned TSR; or
 - b. A TSR lower in the queue requires capacity on one or more constrained Network Flowgates, external interconnections, or interties during a time period when transmission service can be offered without affecting the capacity encumbered for a TSR at a higher position in the queue

D. Provisions for a LTF TSR Approaching the Requested Stop Date

1. When a pending LTF TSR has a remaining duration of less than 60 days (that is, there are less than 60 days until the requested service termination date), BPA TS will give the TSR an OASIS status of REFUSED. The TSR will receive no further consideration.
2. For a LTF TSR that is awaiting the completion of required transmission upgrades (Initial TSR), as demonstrated by having met the requirements listed in C.3 below, BPA TS will allow the Customer to submit a Follow-on TSR to retain queue priority and pending status upon the expiration of the Initial TSR or subsequent Follow-on TSRs.

3. The Initial TSR or subsequent Follow-on TSRs must meet all of the following requirements to be considered as awaiting the completion of required transmission upgrades:
 - a. The Initial TSR is not associated with an effective PTSA;
 - b. The Initial TSR is or previously was included in an individual system impact study or cluster study;
 - c. The Customer of an Initial TSR is actively meeting or has met BPA TS' requirements for supporting the identified transmission expansion project(s) associated with that TSR, as those requirements may change; and
 - d. The Initial TSR qualifies for Reservation Priority under section 2.2 of BPA's Open Access Transmission Tariff and any applicable Business Practices.
4. The following requirements apply to the submittal of a Follow-on TSR:
 - a. The Customer must submit a Follow-on TSR at least one year prior to the requested stop date of the Initial TSR in order to retain the queue time of the Initial TSR.
 - i. If applicable, the Customer must submit a subsequent Follow-on TSR at least one year prior to the requested stop date of a preceding Follow-on TSR in order to retain the queue time of the Initial TSR.
 - ii. BPA will permit the submittal of a Follow-on TSR after the one-year deadline if the Follow-on TSR is submitted within 10 business days of the date that the Customer's TSR first meets the requirements listed in section C.3 above.
 - iii. BPA TS will not accept the submission of Follow-on TSRs after these deadlines.
 - b. The start date of the Follow-on TSR must match the stop date of the Initial TSR;
 - i. If applicable, the start date of any subsequent Follow-on TSR must match the stop date of the preceding Follow-on TSR.
 - c. The Follow-on TSR must reference the AREF of the Initial TSR in the Deal Ref section;
 - i. If applicable, any subsequent Follow-on TSR must reference the AREF of the preceding Follow-on TSR in the Deal Ref section.
 - d. The service type, POR, POD, Source, Sink and Path of the Follow-on TSR must match that of the Initial TSR; and
 - e. The Service Duration of the Follow-on TSR must match the Initial TSR or preceding Follow-on TSR.
5. For an Initial TSR that is type REDIRECT, the Follow-on redirect TSR must meet the following requirements:
 - a. The Transmission Customer must have renewed the Parent reservation in order to be able to submit a Follow-on redirect TSR.
 - b. The Follow-on redirect TSR must be a redirect of the RENEWAL Parent reservation.

- c. For a Follow-on redirect TSR, the Service Duration must match that of the RENEWAL Parent reservation.
 - d. The start date of the Follow-on redirect TSR must match the stop date of the Initial redirect TSR.
 - i. If applicable, the start date of any subsequent Follow-on redirect TSR must match the stop date of the preceding Follow-on redirect TSR.
 - e. The Follow-on redirect TSR must reference the AREF of the Initial redirect TSR in the Deal Ref section;
 - i. If applicable, any subsequent Follow-on redirect TSR must reference the AREF of the preceding Follow-on redirect TSR in the Deal Ref section
 - f. The service type, POR, POD, Source, Sink and Path of the Follow-on redirect TSR must match that of the Initial redirect TSR.
 - i. If applicable, the service type, POR, POD, Source, Sink and Path of a subsequent Follow-on redirect TSR must match that of the preceding Follow-on redirect TSR.
6. The Transmission Customer will not be charged a TSR processing fee or be required to provide a TSR deposit for the submission of Follow-on TSRs.

The example figures below display the relationship between Follow-on redirect TSRs and the CONFIRMED Parent reservation. Figure A shows CONFIRMED Parent reservation X with Initial redirect TSR Y. Figure B shows the RENEWED Parent reservation X1, and the associated Follow-on redirect TSR Y1

Figure A: Initial redirect TSR Y of Confirmed Parent reservation X

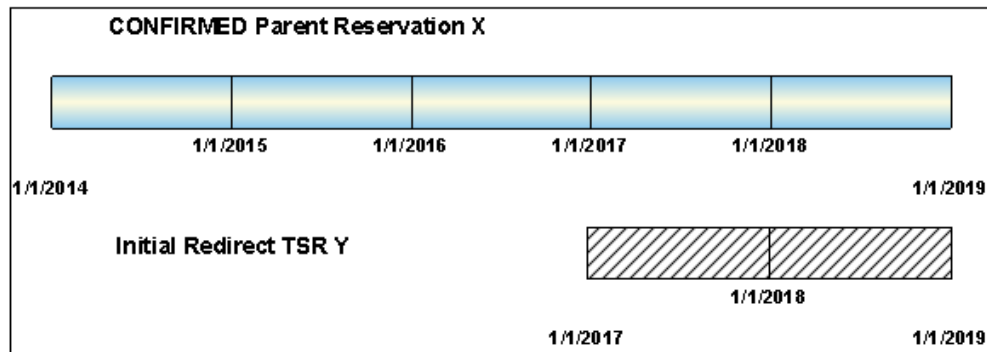
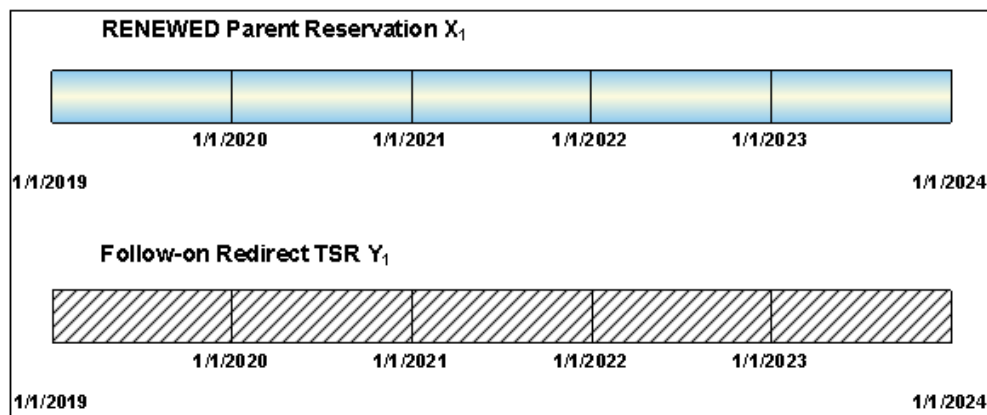


Figure B: Follow-on redirect TSR Y₁ of Renewed Parent reservation X₁



E. Specific Provisions

1. If a LTF TSR requires a WECC path rating increase, BPA TS cannot obtain Western Electricity Coordinating Council (WECC) approval for an increase in the WECC rating of paths identified in the WECC path rating catalog without participation by the Transmission Provider(s) at both ends of the intertie/external interconnection.
 - a. The Customer will be required to advance fund the WECC study process as well as any other required agreements to maintain a valid completed application. These additional studies may be able to be performed at the same time as the System Facility Study (SFS).
 - b. Studies usually take 12 to 18 months to obtain a new WECC path rating if the requested service requires an increase in the rating of a WECC rated path.
2. Montana Intertie Transmission Requests
 - a. The portion of the Montana Intertie between Broadview and Townsend is outside of the service area in which BPA TS has authority to construct additional facilities to provide more capacity.

- b. If there is a future upgrade of the Montana Intertie, BPA TS could acquire additional rights from Broadview to Townsend only by agreement with the owners of the Broadview to Townsend line segment.
- c. BPA TS will require the Customer to arrange any upgrades on other systems (including the Montana Intertie from Broadview to Townsend) that may be required to provide additional capacity on the Townsend to Garrison segment pursuant to Section 21.1, Responsibility for Third-Party System Additions, of the OATT.

F. Environmental Review

1. If an environmental review is required, BPA TS will offer the Customer an initial Environmental Compliance Agreement (ECA) as soon as practicable, but no later than the completion date of the first required OATT study, which is typically a System Impact Study (SIS).
2. The ECA may be modified as the Customer's request is refined and additional environmental review tasks are identified.
3. If all other requirements have been met, upon completion and approval to proceed pursuant to the decision reached under the ECA, BPA TS will offer the Customer a Financial Agreement and/or a Construction Agreement, if needed.

G. Generation Interconnection Process

1. Assuming sufficient ATC, BPA TS will proceed with offering an Exhibit for a TSR considered linked to a Generation Interconnection Request when all usual criteria (i.e., those that apply to non-linked requests) for offering transmission service are met and the earliest of:
 - a. The Generation Interconnection Request is WITHDRAWN by the Interconnection Customer; or
 - b. The Interconnection Customer fails to conform to the required Large Generation Interconnection Procedure [LGIP] timelines and requirements; or
 - c. The Customer requests in writing that an Exhibit be offered; or
 - d. Fifteen calendar days after BPA TS delivers to the Customer a completed Interconnection Feasibility Study report; or
 - e. If the Interconnection Customer waives the Interconnection Feasibility Study, fifteen days after BPA TS tenders to the Interconnection Customer an Interconnection System Impact Study (ISIS) Agreement.